DOCUMENT RESUME

ED 144 192 95 EA 009 891

AUTHOR Pino, Rene F.; Emory, Ruth P.
TITLE Instructional Strategies. Preparing Educational Training Consultants: Organizational Development (PETC-III).
INSTITUTION Northwest Regional Educational Lab., Portland, Oreg.
SPONS AGENCY National Inst. of Education (DHEW), Washington, D.C. Basic Skills Group. Learning Div.
PUB DATE Sep 77
CONTRACT NE-C-00-3-0072
NOTE 144p.; For related documents, see EA 009 889-892
AVAILABLE FROM Commercial-Educational Distributing Services, 8116 S.W. Nimbus, Beaverton, Oregon 97005 ($5.60)

EDRS PRICE MF-$0.83 Plus Postage. HC Not Available from EDRS.
DESCRIPTORS *Consultants; Elementary Secondary Education; *Instructional Design; Instructional Materials; Manuals; *Organizational Development; *Training Techniques; *Transfer of Training; Workshops
IDENTIFIERS *Preparing Educ Training Consultants Org Devel; *Providing Organizational Development Skills (PODS)

ABSTRACT

This is one of three companion volumes that present the theoretical basis, instructional strategies, and participant materials for the Preparing Educational Training Consultants: Organizational Development (PETC-III) program, an instructional system for training school system organizational development (OD) consultants. This particular publication is an instructional manual for use by the senior trainer in charge of the PETC-III program. Besides outlining instructional strategies for use during the workshop activities, it also includes a sample set of memos, work assignments, and additional resources to be mailed to program participants between workshops. The PETC-III program is one of eight instructional systems that together comprise the Providing Organizational Development Skills (PODS) programs, which is intended to provide educators with the knowledge, skills, and sensitivities to organize and manage educational systems in more relevant, humane, effective, and efficient ways. The eight component systems of PODS are most effective when taken sequentially; PETC-III is intended to be the last step in that sequence. The training design of PETC-III calls for five separate 3-4 day workshop sessions totaling 17 days, to be held during a period of 6-8 months. (JG)

Documents acquired by ERIC include many informal unpublished materials not available from other sources. ERIC makes every effort to obtain the best copy available. Nevertheless, items of marginal reproducibility are often encountered and this affects the quality of the microfiche and hardcopy reproductions ERIC makes available via the ERIC Document Reproduction Service (EDRS). EDRS is not responsible for the quality of the original document. Reproductions supplied by EDRS are the best that can be made from the original.

"PERMISSION TO REPRODUCE THIS MATERIAL IN MICROFICHE ONLY HAS BEEN GRANTED BY

E. Tyler

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

PETC-III

ED144192

BEST COPY AVAILABLE

Preparing Educational Training Consultants: Organizational Development

Instructional Strategies

EA 009 891

René F. Pino
Ruth P. Emory
Northwest Regional Educational Laboratory

Natalie B. Northam, Editor

September 1977

A publication of the Northwest Regional Educational Laboratory, a private nonprofit corporation. The work upon which this publication is based was performed pursuant to Contract NE-C-00-3-0072, with the Basic Skills Group/ Learning Division of the National Institute of Education. It does not, however, necessarily reflect the views of that agency.

Northwest Regional Educational Laboratory, 710 S.W. Second Avenue, Portland, Oregon 97204

Published by Commercial-Educational Distributing Services, 8116 S.W. Nimbus, Beaverton, Oregon 97005

Preparing Educational Training Consultants: Organizational Development (PETC-III)

CONTENTS

ACKNOWLEDGMENTS ix

INTRODUCTION

Developmental History of the Program for Preparing Educational Training Consultants 1

Some Significant Things About Developer Experience With the System 13

FIRST MEETING

Activity 1, Instructional Strategy: Introducing PETC-III Organizational Development 21

Instructional Supplement: PETC-III Trainer Roles 25

Instructional Supplement: Alternatives for Forming Learning Groups 27

Activity 2, Instructional Strategy: Part I of Analyzing Organizational Data 29

Instructional Supplement: Procedures for the Three Rounds in Learning Groups 33

Activity 3, Instructional Strategy: Part II of Analyzing Organizational Data 35

Activity 4, Instructional Strategy: Planning Organizational Development Work (I) 37

SECOND MEETING

Activity 5, Instructional Strategy: Responding to Substantive Issues in Your Organization 39

Activity 6, Instructional Strategy: Diagnosing Organizational Growth and Maturity 41

Activity 7, Instructional Strategy: Planning Organizational Development Work (II) 43

THIRD MEETING

Activity 8, Instructional Strategy: Identifying Critical Issues in the Phases of Consultation 45

Activity 9, Instructional Strategy: Collecting Information from Self and Others About Self As Consultant 47

Activity 10, Instructional Strategy: Giving and Receiving Feedback About Consultant Self 49

Activity 11, Instructional Strategy: Creating Models 51

Activity 12, Instructional Strategy: Planning Organizational Development Work (III) 53

FOURTH MEETING

Activity 13, Instructional Strategy: Evaluating Intervention Theories 55

Activity 14, Instructional Strategy: Introducing the Process of Designing 57

Activity 15, Instructional Strategy: Planning Organizational Development Work (IV) 59

FIFTH MEETING

Activity 16, Instructional Strategy: Reviewing Organizational Development Work 61

Activity 17, Instructional Strategy: Evaluating Intervention Strategies and Techniques 63

Activity 18, Instructional Strategy: Constructing Own Differential Intervention Matrix 65

Activity 19, Instructional Strategy: Building a Future for Your Consultant Self 67

Instructional Supplement: Appointment Chart 69

ADDITIONAL PARTICIPANT MATERIALS

Announcement of Orientation Meeting 73

PETC-III "Seattle B," Meeting Schedule 75

Three-Way Agreement 77

Introduction to PETC-III Training 79

Introduction to Preparing Educational Training Consultants: Organizational Development (PETC-III) 87

PETC-III "Seattle B," Orientation Meeting 95

Reading Assignment for First Meeting 97

Introduction to Preworkshop Assignments 99

PETC-III Sample Memo to Introduce Organizational Development Consultant 135

Making it Perfectly Clear 137

Sample Memo for Meeting 2 139

Sample Memo for Meeting 3 141

Sample Memo for Meeting 4 143

Sample Memo for Meeting 5 145

PETC-III Log for Organizational Development Work 147

LIST OF PARTICIPANT MATERIALS 161

ACKNOWLEDGMENTS

This set of materials has been under development for four years. Many individuals and organizations have contributed to its creation.

The program is an outgrowth of the Educational Intern program of the National Training Laboratories, Institute of Applied Behavioral Science.

The concepts and basic assumptions underlying the *Preparing Educational Training Consultants (PETC)* program were the work of Charles C. Jung during his tenure as Program Director of the Improving Teaching Competencies Program of the Northwest Regional Educational Laboratory.

We gratefully acknowledge the phenomenal efforts of Marilyn Rieff and William Ward in securing test sites and preparing participants for PETC-III training. These efforts, in themselves organizational interventions, quite literally made trying out the materials possible.

We simply could not have gotten along without the expert assistance of our secretary, Juanita Holloway, who typed the mountains of manuscript needed to make the system ready for the training sessions.

Finally, we want to thank the 61 people who "endured to the end." This group committed themselves to fulfilling all the prerequisites--comprising at least eight weeks of work--as well as faithfully attending all the PETC-III sessions and performing all the tasks asked of them. We are honored to present their names.

Norm Bengel
Dolores Bowman
Larry Brammer
Robert Cathey
Georgianne Chaffin
Owen Chase
Charollene Coates
Bob Collopy
Ruth Creasey
Peter Devaney
Kenneth Dotson
Margaret Elliot
Linda Ensign
Richard Fain
Tom Filla
Harry Finnegan
Carolyn Fisher
James Forneris
Elsie Gatcomb
Dean Gaudette
Bob Greger
Bob Grunewald
Bee Hall
Bob Hall
Michael Hansen
Craig Harper
Bill Harris
James Hewson
Wayne Hill
Tom Hughley
Audrey Kolb
Dennis Koeller
Don Kvernvik
Kattie LaBore
Brad Lear
Jack Martin
Bob McGlone
Bob Menzel
Gary Milczarek
Robert Morris
Bob Munson
Adelene O'Brien
Don Osborne
Delores Pattee
Rick Rice
Marilyn Rieff

Peggy Rouse
Chuck Schwahn
Rich Schwarz
Bob Scobie
Walt Stickel
Ron Stroud
Jack Tesmer
Ernestine Thomas
Louisa Thompson
Cecelia Tompkins
Nancy Walton
Bob Ward
William Ward
Myrna Wickstrom
Tom Wilson

x

INTRODUCTION:
DEVELOPMENTAL HISTORY OF THE PROGRAM FOR
PREPARING EDUCATIONAL TRAINING CONSULTANTS

A training program developed by the National Training Laboratories (NTL) with the same name was the forerunner to the Northwest Regional Educational Laboratory (NWREL) program, *Preparing Educational Training Consultants*. This program was intended to provide educators with skills to provide school districts with the capacity to provide skills training, consulting and organizational development. The design was presented in a four-week training workshop. Its content was derived from assessment of the functions lacking in education and the availability of training techniques as well as materials from a history of human relations training and organizational development studies. The program was successfully conducted for three summers, beginning with the year 1966. The training consultant role in the NTL program was initially viewed as a way to provide linking mechanisms among and between subsystems in local districts so that procedures for improving education could be identified and implemented.

The NTL program was considered successful, but it had two major limitations for meeting a national need to provide training in the areas of skills training, consulting and organizational development. The design was exploratory from year to year as the staff changed and provided focus related to their current social science interests. Exciting new additions were experienced in the training design of any given year, but there was no assurance to trainees that they would be provided competencies in the best of what was known at the time. A second limitation had to do with diffusion. Highly skilled trainers were needed to conduct this flexible type of training system. Such trainers are rare

and cannot be developed rapidly enough to mass diffuse the needed skills for education.

PETC programs--PETC-I, PETC-II and PETC-III--are mass-diffusable training systems for the basic skills which have been mentioned. These training systems take the expertise from the role of the trainer and put it into the training materials. They take the function of instruction from the trainer and put it into the learning activities. The trainees instruct themselves and each other. These systems include diagnostic and objective assessment tools and techniques for achieving behavioral competencies as part of the predesigned training sequence.

The following diagram shows the relationship of the three units in the PETC program and the points at which the prerequisite training is necessary.

The PETC program has been a part of the Basic Program Plans of the NWREL Improving Teaching Competencies Program (Program 100) since 1968. Work on PETC-III began in 1971 with the identification and writing of the central ideas and general objectives for the training. During 1971 the decision to prepare an initial training plan of five two-day meetings spread over a six-month period was made and training activities with materials to support them were prepared.

The first tryout of PETC-III materials was held in Spokane, Washington, from January to April 1972. The participants for this workshop were recruited by the developers and included central office personnel from the Spokane School District, university professors, and two persons from the Washington State Department of Public Instruction.

A major finding of this tryout was the need for more careful plans for entry into the training. Orientation to the training was prepared;

	PETC-I: Skills Training	PETC-II: Consulting	PETC-III: Organizational Development
Usual Client System	Individual or small group	Small group or major subsystem of the organization	The organization (although most of the work may be with a major subsystem)
Assistance for Client	To increase process skills such as goal setting, communicating, influencing or decision making	To move through phases of an improvement effort	To add and maintain improved functional capability To increase those functional capabilities that enable the organization to add new kinds of objectives or use new kinds of resources
Competencies of the PETC Consultant	Diagnosis for, and provision of, group process skills training exercises	Differential diagnosis and intervention to provide added functions in a temporary relationship	Application of diagnostic and intervention techniques to facilitate normative and structural changes in the organization which a) maintain improved functions and b) make its identity and decision-making dynamic in response to social change
Usual Duration of the Client Relationship	A few hours or days	A few days or weeks	Several months to four or five years
Prerequisite Competencies	Trainer Experience In: Action Research, Research Utilizing Problem Solving (RUPS) Interpersonal Communications (IPC)	PETC-I Interpersonal Influence (INF)	PETC-II System Technology Social Conflict & Negotiative Problem Solving (SC&NPS)

Figure 1. Relationships of the Three PETC Systems

procedures for contracting with trainees, clients and installers were instituted; and preworkshop assignments were designed. In addition, revisions and refinements of the training meetings were made. New sets of materials were prepared for the second trial workshop.

The next PETC-III tryout was started in September 1973, concluding in March 1974. This tryout was held at a conference center near Portland and was attended by trainees who had been recruited by the developers. Trainees included school district central office personnel; university professors and administrators; as well as people in church-related professions.

During the tryout the decision was made to integrate the projected PETC-IV unit--Organizational Self-Renewal--into PETC-III. Portions of these concepts were introduced to the trainees. It also became clear that five 2-day training meetings provided inadequate time for the work required. It was decided to extend the number of days of training from 10 to 17 days. Meetings 1 and 5 would each take 4 days. Meetings 2, 3 and 4 would each take 3 days.

The developers then proceeded to make major revisions in the instructional system to incorporate the additional materials and provide training activities and materials for an expanded workshop. When the revisions were complete, the materials included sets of procedures for the trainees to follow and a number of resource papers to enhance and elaborate the central ideas for the instructional system.

Between April and December of 1974 the newly written materials were tested at two sites. In April a workshop was started in Portland and in May another workshop was started in Minneapolis. Participants for both of these workshops were recruited by the Office of Field Relations and

Dissemination for the Program, NWREL. Trainees included school district central office personnel, school building administrators, university professors, classroom teachers, private consultants, a mental health worker, a church worker, NWREL's Improving Teaching Competencies Program personnel and university students.

One of the findings of this trial indicated a significant cognitive overload in Meetings 1 and 2. During these meetings all of the concepts in the book of central ideas are introduced and utilized. The result was a decision to mail the book of central ideas to all participants prior to the first training meeting. Home reading assignments are now made prior to Meetings 1 and 2. During this tryout a format for trainees' progress reports, theory inputs, procedures and organizational development (OD) work plans were designed. Also, further work needed to be done on a preworkshop orientation. Therefore, a decision was made to ask participants in the second of the final pair of workshops to attend a one-day orientation to the training.

The length of the training (six months) allowed the developers to make refinements and revisions meeting by meeting. In this way the developers established some formats for progress reports, resource papers, procedures, exercises and planning for OD work. Revisions and refinements of the sets of materials were well under way so that the first of the final pair of tryouts could start in December 1974.

The final pair of workshops were conducted with two different groups in Seattle, Washington, between December 1974 and July 1975. "Seattle A" group started in December 1974. The additional orientation day for "Seattle B" group was held on February 1, 1975 with the first training session conducted near the end of that month. Participants for this

pair of workshops were recruited by the Office of Field Relations and Dissemination in close collaboration with Mr. James D. Forneris of the Seattle Public Schools who served as their representative.

The participants included school counselors, building administrators, a university librarian, district central office personnel, classroom teachers, a district superintendent, an assistant superintendent and an individual from a state department of public instruction.

At the end of this pair of tryouts the developers concluded that PETC-III appeared to be a workable instructional system. It is now ready for persons not involved in the development to try out the materials.

Throughout the development of the instructional system information was collected about the experiences of the participants with their client systems. The evaluators asked the participants to keep a record of all their activities between training meetings. At each training meeting they were requested to prepare a report of the current status of their work with their client system. At the conclusion of the six workshops the evaluator, developers and the director of the Office of Field Relations and Dissemination selected seven of these reports as representative of the kinds of experiences the trainees had with their client systems. The evaluator then conducted a number of interviews and followup data collection to get information for case studies. The result of this work, entitled *First Time Out: Case Studies of Neophyte Consultants*, is recorded in the Appendix to the *Participant Materials*.

DESIGN OF THE TRAINING SYSTEM

Installation of PETC-III

The installation of the *PETC-III: Organizational Development* instructional system is crucial in the whole training design.

This system does not stand alone and independent of its prerequisites. The goals and objectives, the strategies and procedures of the system are dependent on the interpretation and preparation provided by the installation procedures. These procedures include preparing prospective PETC-III trainees in the prerequisite skills for PETC-III and securing from them commitment to fulfilling the time and work requirements to complete the training.

PETC-III is the last step in the installation of the program for *Providing Organizational Development Skills (PODS)*.

PODS is a macro training strategy which aims at providing a large segment of a school district with process skills and with trainer capabilities for a continuous training program. In addition, the PODS program provides training in consulting skills and organizational development (OD) skills to a much smaller segment of educators. The overall purpose is to make available to educational organizations a repertoire of OD competencies to facilitate normative and structural changes. Such competencies allow the organization to build in and maintain improved organizational functions and to make its decision making dynamic in response to social change.

Installation of PODS in an educational organization (a school district, a school building, a university) has a number of requirements. It requires acceptance and authorization by the school district central

office decision makers. It includes making provisions for a large number of educators and the prospective PETC-III trainees to secure training in "process" skills as presented in the instructional systems *Research Utilizing Problem Solving (RUPS)*, *Interpersonal Communications (IPC)*, *Interpersonal Influence (INF)* and *Social Conflict & Negotiative Problem Solving (SC&NPS)*. In addition to these workshops, prospective PETC-III trainees need to have preparation for skills training and consulting skills through training in *PETC-I: Skills Training* and *PETC-II: Consulting*. This entire training strategy has two purposes:

1. To provide the organization with a large number of persons equipped with a repertoire of skills
2. To create for prospective OD consultants a climate of receptivity and readiness for performing OD activities

The installation procedure of PODS also provides a screening process by which persons interested in OD work can be identified and contracted with to carry out consultation in organizational development.

Once potential participants in PETC-III training have been identified and selected, the installation process proceeds by securing from the proper decision makers the authorization of PETC-III training. This includes the initial contracting and the securing of client systems for the teams of consultant trainers.

To summarize, installation of the PETC-III system includes:

1. Getting the idea of PODS accepted by an educational organization
2. Preparing prospective participants for PETC-III training, enabling them to acquire all prerequisite skills for PETC-III
3. Screening and identifying PETC-III participants

4. Contracting with the proper authorities for proceeding with PETC-III training

5. Identifying and securing client systems for the consulting teams in the PETC-III training

6. Providing detailed additional information to the proper authorities, potential client system and PETC-III trainees concerning all requirements of the training, including timelines, schedules, costs, practicum OD work, advanced reading, data collection, nature of relationships, accountability, registration forms and statements of agreement to participate in the PETC-III training program

Pretraining Orientation and Contracting

When the installation procedures are complete, the next event is a one-day meeting with the trainees who have decided to proceed with PETC-III. Also asked to attend this meeting are the decision makers in the organization of each participant who authorize and support the training as well as a representative of the client group with whom the participant will be working.

Select the appropriate strategies from Activities 1 and 2 of Meeting 1 to be used during this orientation meeting. For a sample set of strategies, see "PETC-III 'Seattle B' Orientation Meeting," pages 95-96. This meeting is designed to accomplish the following:

1. Examine all requirements and expectations for PETC-III training

2. Form consulting teams of two persons each; during training these teams are referred to as training units (TU)

3. Identify client systems and assign to each team; do preliminary planning for contacting those client systems

4. Distribute preworkshop assignments and materials to trainees; clarify and discuss reading assignments, data collection assignments and guidelines for entry into client systems

5. Sign three-way agreements among trainees, trainers/installers and authorizing persons

6. Reach agreement on dates for the five training meetings during a six- to eight-month period

7. Outline materials for the workshop; participants are expected to purchase three resource reading books (see page 11) as well as the *PETC-III Participant Materials* (These books should be available for purchase at the first meeting.)

Training Meetings

The training design calls for 5 meetings totaling 17 days. Meeting 1 and 5 are each 4 days in length. The others are each 3 days long. The 5 meetings are held during a period of 6 to 8 months, with 30 to 45 days between meetings to allow consultant teams to carry out their OD plans with a client system.

The format for each of the training meetings includes the following:

1. Reporting progress in OD work

2. Making plans for OD work

3. Considering additional theoretical input, training activities, intervention issues, and professional development issues

The training materials for this system consist of:

Jung, Charles C. *Organizational Development in Education.* Portland, Oregon: Northwest Regional Educational Laboratory. 1976.

A book of central ideas which provides the theoretical framework for OD in educational settings.

Pino, René F. and Ruth P. Emory. *Preparing Educational Training Consultants: Organizational Development (PETC-III) Participant Materials.* Portland, Oregon: Northwest Regional Educational Laboratory. 1976.

A participant manual containing procedural, instructional and theoretical information.

Pino, René F. and Ruth P. Emory. *Preparing Educational Training Consultants: Organizational Development (PETC-III) Instructional Strategies.* Portland, Oregon: Northwest Regional Educational Laboratory. 1976.

A manual for the senior trainer's use which also includes a sample set of memos, work assignments and additional resources to be mailed to participants between meetings.

The *Participant Materials* should be distributed during the pretraining and orientation contracting meeting. In addition to these materials, each participant is asked to purchase a copy of:

Schmuck, Richard A. and Matthew B. Miles. *Organization Development in Schools.* Palo Alto, California: Mayfield. 1971.

Schmuck, Richard A. and Philip J. Runkel. *Handbook of Organization Development in Schools.* Palo Alto, California: Mayfield. 1972.

Koberg, Don and Jim Bagnall. *The Universal Traveler.* Los Altos, California. Kaufmann. 1974

Multiple copies of these books should be available at the first meeting of each workshop. Although occasional assignments are made in them, they serve primarily as resource information for the participant's use during the months of the training.

Training Design

The PETC-III training design has been prepared on the assumption that the total number of participants does not exceed 12 persons. The participants work in teams of two persons, called training units (TU). The total group is divided into two subgroups, called learning groups (LG).

Each learning group is composed of three training units. PETC-III training requires a trainer for each learning group, so a training unit with two learning groups would require two trainers.

During a practicum experience, each team conducts an OD project with a client system. The client system may be a total organization or a subsystem of the organization. The person or persons directly involved with the OD team are referred to as "direct client."

SOME SIGNIFICANT THINGS ABOUT DEVELOPER EXPERIENCE WITH THE SYSTEM

There are a number of things about the experience of the developers with the PETC-III system that stand out as significant. In some cases the experiences provided them with information for revising the system; in other cases they were interested, sometimes surprised, observers of what they considered significant occurrences. Most of the items in the list below are the result of observations made during training sessions. The developers have selected the following categories to report their observations: Groupings; Learning the Concepts; Doing OD Work; Activities During Training Sessions; Trainer Behaviors; Making Arrangements for Training Sessions. Obviously, the statements that follow do not include ALL there is to say about the PETC-III system. They are observations that strike the developers as having enough significance to be recorded for consideration by anyone wishing to use this training system. These remarks appear noteworthy as aspects of the developers' experiences in using the training materials in six workshops with a total of sixty people.

Groupings

Formation of Learning Groups. In the formation of learning groups (LG) it appears the option of having the trainees form their own LG is probably the best course of action. It takes longer, may require extended negotiation, may give rise to membership issues, but there seems to be evidence of greater satisfaction by the trainees with the makeup of the self-selected learning groups than when the trainer forms them.

Advantages of LG Members Being From the Same Organization. There are some advantages when the training units (TU) in a learning group are

from the same organization. For example, there is need for less explanation about the organization, more information about the situation is commonly known, informal norms and influence networks are common knowledge.

Advantages of LG Members Being From Different Organizations. The advantages of the training units in the learning group being from different organizations include: less subjective consideration of issues, more reliable perception checks, different perspective from which to view issues, more new ideas about approaching issues.

The Value and Significance of the LG. The learning group makes a contribution to the trainees in at least the following ways:

1. Provides trainees an opportunity to get additional perspectives on organizational development and on the specific issues and tasks of the OD work of the training unit
2. Provides an ongoing and dependable source of new ideas, alternative solutions and a critique of the work done by the training unit
3. Provides a place to exchange information and acquire a repertoire of intervention strategies and techniques in OD work

Size of Training Unit. The experience of conducting six PETC-III workshops convinces the developers that for maximum benefit the TU should be two persons. One person as a TU experiences these difficulties:

1. Receives no perception check during practicum
2. Provides less input for the LG
3. Feels isolated and less supported

Three persons as a TU experience these difficulties:

1. Finding mutually convenient time to get together to plan OD work and carry out plans with client system
2. Less "air-time" during meetings of the TU

3. The real possibility that the client system feels overwhelmed

4. The range of experiences for each individual is greatly reduced

Learning the Concepts

Premeeting Reading Assignments. Advance assignment of reading in the central ideas book, *Organizational Development in Education*, makes trainees feel less pressured during the training meetings and provides more satisfaction in completing tasks which utilize and apply the concepts.

A Condition Which Makes for Quick Use of Concepts. Persons who have OD work as a career goal or whose role in the organization includes dealing with organizational issues view PETC-III training as professional advancement and generally are able to utilize the concepts with greater ease and speed.

Effect of Not Completing a Change Effort with Client System. Participants give evidence of understanding and applying correctly the concepts presented in each training meeting even if most of their practicum is spent in making entry in the client system, finding and losing clients, establishing relationships and so forth.

Doing Organizational Development Work

Data Collection Hazards. Expecting participants to do very much data gathering in their client system prior to the start of the training is unrealistic. Some of the reasons for this are:

1. Participants have not had the chance to establish relationships

2. Client systems are not clear about what is involved in OD work

3. A number of entry issues have not even been identified, much less resolved

Limited Range of Experiences. The limited time of six to eight months for the PETC-III training and practicum reduces the range of experiences possible in OD work with the client system. There is not enough time to implement a full-scale change effort, utilizing all the phases of the planned change model.

Total Organization Change Not Possible. This limited time for the PETC-III training and practicum probably precludes any total organization change taking place. Change efforts within a subsystem may occur and significant organizational data gathering will probably take place.

Effects of a Team Made Up of an External and an Internal Consultant. Training teams composed of one participant external to the client system and one participant internal to the system have difficulties when working with the clients.

1. The external consultant may have difficulty finding time to spend with the client.
2. The external consultant may have difficulty in being "legitimized" by the client system.
3. Time for teamwork for planning and analysis is hard to secure.
4. The internal consultant will be faced with the problem of avoiding or coping with getting ahead of teammate.

Success of Trainee in Being Legitimized in Client System. Persons who already have legitimate or expert power in their client systems, appear to have more success in securing legitimization for their practicum than do persons with less legitimate or expert power.

Participants' Role in the Organization Affects Their Legitimization as Consultants. Participants in nonadministrative roles in the organization, or whose roles do not include attending to organizational issues, frequently experience difficulty in being accepted as consultants.

Participants in "Organizational Development" Roles. Participants whose roles are, or include, attending to organizational issues can more readily proceed with consulting activities than others in the training without such roles.

Effects of Losing a Client System. Losing a client system need not signal a need to leave the training or assume that further learning is short-circuited. This event can be a source for some or all of the following:

1. Learning more about the organization and organizational development work
2. Practicing techniques of terminating a consulting relationship
3. Utilizing and applying the differential diagnostic matrix and other diagnostic tools to increase understanding of OD work

Activities During Training Sessions

Increased Independence with Learning Styles. The expectation that trainees will manage their own time when presented with sets of procedures requiring large blocks of time results in adaptive use of the procedures, independent learning behaviors and satisfactory completion of tasks.

Acceptance of Trainee Learning Styles by the Trainers. Allowing trainees to proceed with their tasks in their own way and to discover and identify their own learnings tends to produce a free and stimulating environment for discussion of concepts and their application.

Trainer Feedback to Participants. The system places great emphasis on peer feedback and self-evaluation. However, some participants express a need to hear the evaluation of the trainers. It will always be an issue for the trainers to decide when to give feedback, what kind and how much.

Setting Up the Training

Best Time for a PETC-III Workshop. Most school systems are not functioning enough during the summer to allow client system accessibility to trainees. Therefore, PETC-III training within the school year is a more satisfying experience for the participant.

Significance of Prerequisite Training. Completion of the minimum prerequisite training--*RUPS, IPC, INF, PETC-I* and *PETC-II*--is crucial to a good PETC-III experience. Without this prerequisite training, participants find it difficult to utilize the concepts, and relate to or respond relevantly to a client system. If there is a loss of client or if there is a crisis in the organization, trainees without the prerequisites have difficulty in finding something to do or learn during the training meetings.

Value of Residence Training. Residence training provides a number of valuable results not possible when the training is in a "commuter" setting. For example, there is greater group cohesiveness, more time for reflection and conversation, more opportunities for consultation with trainers.

Some Areas for Exploration and Strengthening the System

Strengthening Procedures to Assist Participants to Make Entry Into the Client System. It appears that the system is strengthened when the trainers became more active in the orientation and preworkshop phases. They should act on behalf of the participants to assist them in initial client contacts, including activities such as:

1. Helping trainees plan entry
2. Providing orientation for client systems, prior to meeting consultants
3. Providing client system with information about OD and PETC-III training

Enlarge the System By Three Days to Implement Entry Strategies. A way to help trainees plan entry is to enlarge the system by one 3-day meeting to include:

Day 1: A trainer meets with the TU to plan for entry

A trainer meets with the client (or their representative) to present OD work, kinds of things the training will include, ways in which they can support the trainee during the practicum

Day 2: TU and client representatives have initial meeting, data gathering interview, etc.

Clarification and signing of three-way agreements, after which the clients could leave

Day 3: Complete orientation and make assignments for next meeting

Possible Additions to the System. For persons who may be considering using this system, the following activities are recommended as possible additions to PETC-III.

1. Revise Meetings 1 and 2 to give more emphasis to practical issues dealing with entry

2. Instruct trainers to make more interventions about entry, e.g., giving advice, suggesting alternatives, asking questions, retrieving resources

3. Provide more information to the client systems dealing with expectations, limitations, anticipated outcomes

4. Explore advantages and disadvantages of the trainer maintaining contact with the client systems on behalf of the trainee during the entire workshop

5. Identify more explicitly the difference between contracting by installing agency and the authorizer of the training, and contracting between trainees and their direct clients

Exit Issues. The system is strong in the last meeting where focus is on the individual learnings and future plans, but more attention needs to be paid to how the trainees close their practicum relationship with their direct client and with its organization.

*Activity 1
First Meeting

INSTRUCTIONAL STRATEGY: INTRODUCING PETC-III ORGANIZATIONAL DEVELOPMENT

Time	Steps	Materials	Directions
20 min.	1. Getting acquainted	Trainer option	1. The amount of time used for this step and the activities selected are at your option, depending on factors such as: a. If the organizational development (OD) consultants are not acquainted, select a get-acquainted exercise you enjoy and use it b. If the group is already acquainted (as, for instance, all are from the same organization with frequent contact) design an informal "warm-up" to their being together in PETC-III training If the evening starts with dinner you may want to either start or complete this step at that time. How you do it is your option.
30 min.	2. Reviewing training expectations and checking perceptions	Extra Copies of Orientation Materials, Agreements, Introduction of Central Ideas, Schedule Charts	2. Ask the participants to turn to their copies of the orientation materials and the agreement forms. Review these items briefly with them, paying particular attention to the agreements. Refer to the training schedule, and to the future dates of PETC-III meetings.

*NOTE: This session is designed to be in the evening, followed by four days of training except when a one-day pretraining orientation meeting (see page 95) has been held. In this case, review the activities of the orientation session and proceed with Step 2 of Activity 2.

Time	Steps	Materials	Directions
	2. (Cont.)		*Ask trainees to find the Introduction in the book presenting the central ideas (CI) for this system. Review this material with them. **Conduct a discussion about expectations of the training for any needed clarification, using enough time for both you and the trainees to be satisfied you have achieved clarity.
20 min.	3. Identifying issues		3. Ask the training units (TU) to have a meeting and identify issues Tell them to identify and clarify any current or potential issues about how they will relate to each other and to their organization during PETC training. If there are training units which are individuals, ask two or three of them to meet together to identify and share issues of organizational relationship. Ask for reports about issues.

*NOTE: Jung, Charles. *Organizational Development in Education.* Portland, Oregon: Northwest Regional Educational Laboratory, 1976.

**NOTE: At this point call attention to how the trainer role in PETC-III differs from trainer roles in PETC-II. See Instructional Supplement: PETC-III Trainer Roles.

INSTRUCTIONAL STRATEGY

Activity 1
First Meeting

Time	Steps	Materials	Directions
40 min.	4. Forming learning groups	A1 R1 Binders Participant Materials, *ODS, Handbook	4. Distribute copies of *Participant Materials*. Call attention to the various elements in the materials--color scheme, the listing of materials, purpose of procedure and resource papers. Call attention to purposes and objectives for the first activity. Ask trainees to find Resource 1, Forming Learning Groups. Review the article with the trainees. Tell the trainees to form learning groups (LG) or form the learning groups yourself. If you form the learning groups, you may want to share your rationale with the trainees. See instructional supplement for additional suggestions. Ask learning groups to get acquainted and discuss ways of maximizing learning potential. Call attention to the resource books for sale. Make provision for recording receipt and payment of book, *ODS, Handbook* and *Universal Traveler*.

*NOTE: Schmuck, Richard A. and Matthew B. Miles. Eds. *Organization Development in Schools (ODS)*. Palo Alto, California: Mayfield Publishing, 1971.

Schmuck, Richard A. et al. *Handbook of Organization Development in Schools*. Palo Alto, California: Mayfield Publishing, 1972.

INSTRUCTIONAL SUPPLEMENT: PETC-III TRAINER ROLES

In PETC-I and in PETC-II the roles of the trainer were primarily to manage the training sessions, provide resources and create a learning environment. The roles of the trainer also included critiquing work being done by the trainees in their practicum (the Group Process Skills workshop and in consultation with client systems) by applying criteria provided.

In PETC-III the trainer roles include all of those required for PETC-I and PETC-II. The critiquing role for the PETC-III trainer is expanded. The trainer is expected to be more active with his role, although not so active as to block the processes of the learning group.

In PETC-III the trainer can be expected to function in additional ways, such as:

> Intervening in training units or learning groups (especially where long periods of time are provided for group work) if and when it seems appropriate
>
> Listening for information on which to base a retrieval of relevant research or information to present to the trainees at appropriate times
>
> Confronting trainees with perceptions of quality of work being done--applying system criteria
>
> Being available for consultation with training units and learning groups
>
> Providing additional information during discussions, study time and presentations of activities and procedures

In other words, in PETC-III the trainees can expect the trainer to take a more active role during training sessions than was the case in PETC-I and PETC-II.

Monitoring the projects is the other major role to be expected of the PETC-III trainer. The details of how this role will be taken by the trainer will be worked out with each training unit as a part of "Planning Organizational Development Work" activities and will be discussed at length at that time.

The purposes of the monitoring role are:

To provide guidance, support and resources to consultants during the period of PETC-III training

To maintain a two-way communication system between trainers and trainees

To fulfill requirements and expectations of mutual accountability established by all parties to the training agreements

To provide the opportunity for trainees to seek resources, help, support and guidance in planning and carrying out their OD work

INSTRUCTIONAL SUPPLEMENT: ALTERNATIVES FOR FORMING LEARNING GROUPS

Risks, values and possible consequences

A. Assigning TU's to LG

Risks: Not many risks

Values: Gets the job done quickly, keeps the schedule on time, may achieve a better possible match of complementary resources

Possible Consequences: People may feel less committed to others in the LG

B. Asking TU's to form LG

Risks: Takes longer, may create extreme ambiguity and uncertainty about deciding, may precipitate hostility and resentment in case a TU experience difficulty joining or not feeling welcome in an LG

Values: Provides greater involvement, greater interaction, more information sharing about clients and goals of TU, enhances chances of greater commitment to working in the LG

Possible Consequences: Creates a norm of dealing with unstructured issues, of wanting to spend more time later on interpersonal issues and personal growth

Senior Trainers should observe the process in Option B to become alerted to possible future incidents and issues in each LG.

INSTRUCTIONAL STRATEGY: PART I OF ANALYZING ORGANIZATIONAL DATA

Time	Steps	Materials	Directions
30 min.	1. Introducing Activity 2	A2	*1. Form learning groups. Tell trainers to form them or form them yourself, stating your rationale. Ask LG to meet and share/discuss their fantasies of their OD teams provided during orientation.
2½ hours	2. Analyzing organizational data	P1 CI R2 R3	2. Present steps to be taken in Activity 2 on newsprint. Review topics and resources. Announce that the first two meetings are heavy with cognitive information. Refer to Procedure 1. Review procedures. Call attention to Resource 2, Critical Issues in Phases of Consultation. Ask them to review carefully Chapter IV of central ideas. Say that even though Chapter IV is very much the same material as in PETC-II, the focus is on the organization at the level of human system. They should pay particular attention to the phases of planned change as major kinds of work. Emphasize that they are to do the analysis called for in Procedure 1, using Chapter IV as a basis. Call attention to Resource 3, Tailoring Organizational Development Interventions for Schools, which give emphasis to entry issues. Say that in this and the following exercises two things will be happening simultaneously. They

*NOTE: Form learning groups at this point if you held a one-day orientation with the trainees and did not form them at that time.

Time	Steps	Materials	Directions
	2. (Cont.)		will be studying concepts, some of which will be new, and applying the concepts to organizational data which they have brought with them. Stress that every effort should be made to keep both dimensions equally in focus. Ask them to try to hold the study of the concepts as well as their application to own organization in tension. Emphasize the importance of working quickly with responses that come easily to mind, not trying to manufacture answers. Incomplete, unclear information is to be expected at this point in the training. Say that the trainers are available for consultation not to exceed 10 minutes at a time.
60 min.	3. Preparing to receive and to give feedback on data analysis	P2, Part I R3-6	3. Review Procedure 2 with participants. Emphasize the importance of a strategy for asking for help and for giving help. The roles of client consultant and observer will be especially attended to during the exercise in Step 4. Review Resources 3-6. Visit each TU and reinforce instructions as needed.
4 hours, 30 min.	4. Giving and receiving feedback	P2, Part II P3	4. Use the Instructional Supplement on pages 33-34 to manage the rounds. Reinforce objectives for this exercise. Emphasize that after completing each round the observer will report. At the beginning of each round ask consultants to give their lists of things to watch for to the observer for that round.

Time	Steps	Materials	Directions
	4. (Cont.)		Announce that the trainers will monitor this exercise very closely and will intervene to give feedback on role performance as well as on adherence to guidelines for critiquing in Procedure 3. Call attention to the time schedules for the exercise.
5 hours	5. Applying concepts in Chapter II to own organization	CI R7-11	*5. Announce that this activity will focus on Chapter II of central ideas book. Review Procedure 4 and call attention to the schedule as follows: 30 minutes individual work, 90 minutes TU work, 3 hours LG work. Call attention to specific pages of the reading assignment and emphasize the use of Resource 10. Call attention to Resource 11, saying that later in a game setting the opportunity will be given to see how well they can recall the answers to these questions.

*NOTE: Chapter II, Understanding the Organization as a System, pages 47-54; 69-79 and 109-113.

INSTRUCTIONAL SUPPLEMENT: PROCEDURES FOR THE THREE ROUNDS IN LEARNING GROUPS

1. Determine the order in which the TU's are to give reports.

2. Decide which TU will take the roles of consultant, observer and client for each round.

3. Each round will last a maximum of 90 minutes. Approximately 50 minutes for consultation, 15 minutes to hear observer's report, 10 minutes for debriefing and senior trainer input. Allow 15 minutes between rounds for break and for the TU to review their strategy.

4. During the break between rounds each TU will have time to review its strategy and procedures as client, consultant and observer. The consultants can give observers a list of things to watch for.

5. Trainers will manage the rounds.

6. Trainers will keep these questions in mind:

    a. Are statements being made based on information or impressions?

    b. Are inferences being made?

    c. Is a picture of the organization being presented?

    d. Are the matrices being used in specific ways?

    e. Are the observers following Procedure 3, "Observers" Evaluation?"

    f. Are the consultants active in helping clients to stay in focus?

7. Before LG session starts, announce things you are going to be watching for.

8. If it doesn't happen in the context of observer's report at the end of each round, ask the client how they felt about being helped and the way they were helped.

9. If appropriate after the first round make comments about the following:

    a. Did the consultant press for what the problem is?

    b. Did the consultant press for what kind of help is wanted?

    c. Did the consultant take initiative in keeping reporting in focus?

    d. Did the consultant use matrices and phases of planned change?

INSTRUCTIONAL STRATEGY: PART II OF ANALYZING ORGANIZATIONAL DATA

Time	Steps	Materials	Directions
10 min.	1. Introducing Activity 3	A3	1. Refer to Activity 3. Review purposes, objectives and steps.
2 hours	2. Studying organizational development concepts	P5 CI *ODS*, pp. 139-153 R3 R11	*2. Announce that this activity will focus on Chapter III of the central ideas, and on Chapter 7, "Entering and Intervening in Schools" in *Organization Development in Schools (ODS)* by Schmuck and Miles; and on Resource 3, Tailoring Organizational Development Interventions for Schools. Review Procedure 5 with trainees. Take time to elaborate instructions for the four parts of exercise. Tell them to begin Procedure 5, Part I (individual work) and that you will call time in 2 hours to review instructions for Part II (TU work). Remind them to pay attention to Resource 11, Organizational Development/Intelligence Quotient Questions, and reinforce expectation about the use of the game.
2 hours	3. Analyzing entry into organization	P5 R3 CI	3. Review instructions for Part II of Procedure 5. Ask each TU to manage its time carefully during the next 2 hours to adequately do its analysis and to prepare a report to the LG.

*NOTE: Chapter III, Working at Organizational Development in Educational Systems, pages 117-137 and 152-166.

Time	Steps	Materials	Directions
2 hours	4. Reporting analysis	P5	4. Review Part III of Procedure 5. Check to be sure each TU is ready and reinforce the time limits. Be prepared to supplement or critique any aspects of the report.
1 hour	5. Playing the OD-IQ questions game	P6 Bells, Prizes for Winners R11	5. Review Procedure 6, Organizational Development/Intelligence Quotient Game, and explain how the game is to be played. Form two new groups for this activity. Allow 15 minutes for individuals to review (cram) questions. Say that the intention of the activity is to help with recall of definitions of concepts. Emphasize that this activity is not a final exam, no grades will be given, the competition is between two groups. The activity as a way of learning has low priority in the system, it is considered valuable as a recreational form for highlighting concepts. *Announce that the game is similar to the high IQ game on television. The contest will be based on recalling concepts from memory. Anticipate that the game will hold trainees' interest for 30 minutes. At the conclusion of the game distribute large suckers to winning team and small suckers to losing team or some other inexpensive tokens.

*NOTE: One trainer will act as emcee. The other trainer will keep time, keep score and judge answers.

INSTRUCTIONAL STRATEGY: PLANNING ORGANIZATIONAL DEVELOPMENT WORK (I)

Time	Steps	Materials	Directions
10 min.	1. Introducing Activity 4	A4	1. Introduce Activity 4. Review purposes and objectives.
30 min.	2. Checking perceptions and feelings		2. Ask trainees to form trios and share how they feel about the training up to now. Announce that after 10 minutes they will share with entire group.
15 min.	3. Reviewing guidelines for OD work	P7 P8 R12 R13 R14	3. Read Procedure 7, Guidelines for Planning Organizational Development Work (I), with participants. Take time to elaborate and give emphasis to the introductory paragraphs in the procedure and to review Resources 12 through 14 listed in Part I of Procedure 7. Go over guidelines for work in TU and LG carefully. Call attention to time limits of 4 hours for TU and 3 hours for LG.
4 hours	4. Planning OD work	P7 P8 Logs	4. Reinforce the importance of keeping Team Consultant Logs up to date. Ask participants to work in training units and to follow guidelines in Procedure 7 including completion of Procedure 8.
3 hours	5. Reporting plans	P7	5. Ask participants to share their plans in learning groups and follow guidelines in Procedure 7.

Time	Steps	Materials	Directions
5 min.	6. Premeeting assignments		*6. Tell participants to read *First Time Out*, the appendix to the *Participant Materials*, before the next meeting. This resource may be appropriate to refer to frequently in the training, particularly when trainees are reporting progress or making plans for work with their clients.

*NOTE: Between meetings, remember to mail memos to participants reinforcing premeeting assignments. See pages 135-146 for sample memos.

INSTRUCTIONAL STRATEGY: RESPONDING TO SUBSTANTIVE ISSUES IN YOUR ORGANIZATION

Time	Steps	Materials	Directions
10 min.	1. Introducing Activity 5	A5	*1. Review purposes, objectives and steps of Activity 5 by referring to the agenda.
60 min.	2. Preparing a report of progress	P9	2. Review Procedure 9, Report of Progress, with trainees.
90 min.	3. Studying central ideas	P10 CI**	3. Go over Procedure 10, More PETC-III Concepts, with trainees. Stress that the task is to study from the CI, then identify issues and questions for the discussion to follow. Tell participants to proceed with Part I. Ask them to place a checkmark by the external and internal factors on pages 88-102 of the CI which they think are relevant to issues in their own organizations.
90 min.	4. Discussing issues identified during study	P10	4. Form new groups. Review Procedure 10, Part II, with participants. Ask them to discuss in their new groups.
60 min.	5. Completing progress report	P10	5. Ask TU to meet and follow the instructions in Procedure 10, Part III.

*NOTE: Determine in advance the exact schedule of hours for each step in Activity 5 and present it in Step 1. Build expectations about how the steps in Activity 5 will follow each other.

**NOTE: Chapter II, Understanding the Organization As a System, pages 79-103.

INSTRUCTIONAL STRATEGY

Activity 5
Second Meeting

Time	Steps	Materials	Directions
2½ hours	1. Reporting progress	P11	6. Go over Procedure 11, Guidelines for Reporting Progress, with trainees. Emphasize the guidelines about applying concepts.

INSTRUCTIONAL STRATEGY: DIAGNOSING ORGANIZATIONAL GROWTH AND MATURITY

Time	Steps	Materials	Directions
30 min.	1. Introducing Activity 6	A6	1. Introduce Activity 6. Review purposes and objectives. Call attention to the steps and procedures.
3 hours	2. Diagnosing organizational growth and maturity	P12 CI	2. Review Procedure 12, Diagnosis of Organizational Growth and Maturity, with trainees. Clarify the work assignment of TU and the way of reporting in the LG. Read page 3 of Procedure 12 with the participants, reinforcing "Key Concepts to Remember." Tell participants to proceed with Procedure 12, Part I, reading CI.
3 hours	3. Reporting diagnosis	P12	3. In the LG call attention to Procedure 12, Part II, Guidelines for Learning Group Work, the procedure for receiving and discussing the reports of TU.

INSTRUCTIONAL STRATEGY: PLANNING ORGANIZATIONAL DEVELOPMENT WORK (II)

Time	Steps	Materials	Directions
10 min.	1. Introducing Activity 7	A7	1. Introduce Activity 7. Review purposes and objectives.
10 min.	2. Considering dilemmas of the ODC	R15	2. Present Resource 15. Ask trainees to read, reflect on dilemmas, and write after the instructions on the resource paper. Ask them to share their ideas and thoughts. Allow a few minutes for discussion.
30 min.	3. Reviewing guidelines for planning OD work	P13 P14 R16	3. Call attention to Resource 16 and elaborate on the major kinds of work as it relates to planning OD work. Read Procedure 13, Guidelines for Planning Organizational Development Work (II), with participants. Clarify and emphasize each activity in Procedure 13. Encourage trainees to make use of resources listed when appropriate. In particular, call attention to Resource 16, The Phases of Consultation as Major Kinds of Work (II). Review expectations for reports to the LG.
3 hours	4. Planning OD work	P15	4. Ask participants to work in TU and follow instructions in Procedure 13, Part I.
3 hours	5. Reporting plans		5. Ask participants to report their plans in LG using guidelines in Procedure 13, Part II.

INSTRUCTIONAL STRATEGY

Activity 7
Second Meeting

Time	Steps	Materials	Directions
5 min.	6. Premeeting assignments	R18 R19	*6. Tell participants to study Resource 18, Models and Their Functions and Resource 19, The Power of Abstraction--Model Building As A Way of Life before the beginning of Meeting 3.

*NOTE: Between meetings, remember to mail memos to participants reinforcing premeeting assignments.

INSTRUCTIONAL STRATEGY: IDENTIFYING CRITICAL ISSUES IN THE PHASES OF CONSULTATION

Time	Steps	Materials	Directions
10 min.	1. Introducing Activity 8	A8	1. Call attention to the memo sent between Meetings 2 and 3 and review emphasis for each activity and block of time during three days of Meeting 3. Present the agenda for Activity 8.
10 min.	2. Introducing Procedure 16	P16 R3 R16 *CI	2. Present Procedure 16, Report of Critical Issues in the Phases of Consultation. Encourage trainees to review *First Time Out* for any clues they may get on what is happening to them. Clarify assignments for Steps 3 through 5. Give emphasis to Resources 3 and 16. Call attention to time limits. Announce the time when the LG will meet.
30 min.	3. Sharing news about OD work	P16	3. Conduct sharing for Procedure 16, Part I. Invite participants to share anything they consider "good news" or "bad news" about the work they are doing in OD. Manage the sharing sessions so that it will move along and keep the interest of the group.
60 min.	4. Preparing brief summary of OD work and identifying critical issues	P16 R2	4. Tell participants to follow the instructions in Part II of Procedure 16.
60 min.	5. Presenting reports	P16	5. Review the purpose of reporting and ask participants to present their reports.

*NOTE: Chapter IV, Diagnostic and Planning Tools, pages 171-179.

INSTRUCTIONAL STRATEGY: COLLECTING INFORMATION FROM SELF AND OTHERS ABOUT SELF AS CONSULTANT

Time	Steps	Materials	Directions
10 min.	1. Introducing Activity 9	A9	1. Present the agenda for Activity 9.
15 min.	2. Introducing Procedure 17	P17 Chart of Schedule	2. Present Procedure 17, Collection of Data from Self and Others. Explain in detail every step to be taken. Reinforce that most of the work will be done individually except the times for interviews with others in the workshop. Announce that the work in Activity 9 will form the basis for work in Activity 10. Present newsprint chart of actual clock times for the procedures.
30 min.	3. Reviewing Chapter V of CI	CI	*3. Ask participants to review Chapter V of the central ideas.

*NOTE: Call attention to the significance of the material in Chapter V for applying the differential matrices to self and for determining priorities for personal growth. Reinforce that the work of this activity is basic to the work to be done in Activity 10. Encourage the participants to take the initiative in collecting data from others during Part II of Procedure 17.

Chapter V, Planning Your Growth, pages 217-226.

Time	Steps	Materials	Directions
3½ hours	4. Collecting data from self and others about consultant self	P17	4. Ask participants to carry out the four activities outlined in Procedure 17: 30 min. Part I: My World as a Consultant 60 min. Part II: My Maturity as a Consultant 60 min. Part III: A Diagnosis of Me as a Human System 30 min. Part IV: Recording Insights and Questions Announce that you will call time at the end of each period indicated on Procedure 17. Place the above four activities on newsprint to serve as a reminder for the time schedule.

INSTRUCTIONAL STRATEGY: GIVING AND RECEIVING FEEDBACK ABOUT CONSULTANT SELF

Time	Steps	Materials	Directions
5 min.	1. Introducing Activity 10	A10	*1. Present the agenda for Activity 10.
15 min.	2. Reading Resource 17	R17	2. Ask participants to read Resource 17, Using the Johari Window Model to Increase Awareness of Self as Consultant.
15 min.	3. Introducing Procedure 18	P18	**3. Read Procedure 18, The Giving and Receiving of Feedback About Consultant Self with participants, taking time to elaborate the instructions carefully. Indicate that the work in Procedure 18 is based on the work of Procedure 17. Place on newsprint the actual clock times for the procedures.
30 min.	4. Filling in quadrants	P18, Part I	4. Direct trainees to get started with Procedure 18, Part I.
30 min.	5. Making additions to window	P18, Part II	5. Announce that it is time to start Part II.

*NOTE: Introduce this activity by referring to the high points in Chapter V. Take time to receive questions about the Johari Window, Resource 17, and to provide elaborations, as needed. In presenting Procedure 18, call attention to the importance of giving and receiving feedback, practicing communication skills of paraphrasing and perception checking. Encourage trainees to give the exercise a good try. Provide encouragement for doing this activity.

**NOTE: It is important for the trainers to stay out of the entire process in Procedure 18. The material generated in Steps 4 and 5 has the potential for providing the learning groups with ample information and support to conduct a session for giving and receiving feedback.

INSTRUCTIONAL STRATEGY

Activity 10
Third Meeting

Time	Steps	Materials	Directions
2 hours	6. Giving and receiving feedback	P18. Part III	6. Announce that it is time for Part III and that they have 2 hours for this task.
30 min.	7. Reviewing and revising own window	P18, Part IV	7. Ask them to work alone and fill in new Johari window as appropriate.

INSTRUCTIONAL STRATEGY: CREATING MODELS

Time	Steps	Materials	Directions
5 min.	1. Introducing Activity 11	All	1. Present the agenda for Activity 11.
10 min.	2. Introducing Procedure 19	P19 R18 R19 R20 R21	*2. Read Procedure 19, Creation of a Model, with participants. Take time to elaborate instructions carefully. Call attention to Resources 18 and 19. Resources 20 and 21 are part of the assignment in Procedure 19. Say that models are very useful tools to help participants explain what they do in OD work. Place on newsprint the actual times for the procedures.
60 min.	3. Studying models	P19, Part I	3. Ask trainees to carry out the activities called for in Part I, Procedure 19.
90 min.	4. Constructing a model	P19, Part II	4. Tell TU to meet in their LG to share reports and to construct a model for linking data to diagnosis to intervention, Part II, Procedure 19.
30 min.	5. Discussing models	P19, Part III	5. Convene a general session and ask participants to describe their model and to share their experience of model building, Part III, Procedure 19.

*NOTE: An additional resource to have available is Lippitt, Gordon. *Visualizing Change: Model Building and the Change Process.* La Jolla, California: University Associates, 1975.

INSTRUCTIONAL STRATEGY: PLANNING ORGANIZATIONAL DEVELOPMENT WORK (III)

Time	Steps	Materials	Directions
10 min.	1. Introducing Activity 12	A12	1. Present the agenda of Activity 12.
15 min.	2. Reading Resource 22	R22	2. Ask participants to read Resource 22, The Organization Development Consultant as Theorist (I). Explain that this model of reconstructing a theory will be used for critiquing intervention plans presented to the LG. Announce that between Meetings 3 and 4 trainees will receive an assignment to produce a script based on a situation they know well. This script will serve as the basis for LG work in Meeting 4. Give emphasis to material on page 4 of Resource 22.
10 min.	3. Introducing procedures for planning OD work	P20 R22 R23	*3. Review Procedure 20, Guidelines for Planning Organizational Development Work (III), with participants. Take time to give emphasis to the ideas in Resource 22 and the significance of this paper for theorizing using PETC-III concepts. Reinforce the role of the TU reacting to reports in LG as an opportunity to put in practice the ideas suggested in Resource 22. Call attention to Resource 23, Checklist of Some Important Concepts from PETC-III and its usefulness for planning OD work.

*NOTE: Resource 23 is not intended to be inclusive. The trainer may wish to adapt this list to fit the needs of the group.

INSTRUCTIONAL STRATEGY

Activity 12
Third Meeting

Time	Steps	Materials	Directions
3 hours	4. Planning OD work	P20	4. Ask participants to work in their TU and follow instructions in Part I of Procedure 20.
3 hours	5. Reporting plans	P20	5. Ask participants to report their plans in LG using guidelines in Part II of Procedure 20.
5 min.	6. Premeeting assignments	P21	*6. Tell trainees to prepare Procedure 21, Intervention Case Papers, before the fourth meeting. Take time to explain how to do the work called for. Ask them to bring this assignment to the next meeting.

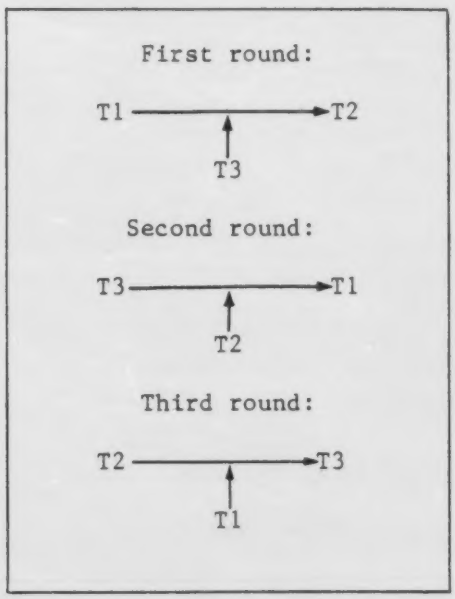
*NOTE: Between meetings, remember to mail memos to participants reinforcing premeeting assignments.

INSTRUCTIONAL STRATEGY: EVALUATING INTERVENTION THEORIES

Time	Steps	Materials	Directions
35 min.	1. Introducing Activity 13	A13	1. Present on newsprint an overview of the three days. Identify topics, schedules, expectations, procedures and resources. Review the agenda for Activity 13 with participants.
15 min.	2. Reading	R22 R24	2. Review Resource 22, The Organizational Development Consultant as Theorist (I), with participants and ask them to read Resource 24 which is an elaboration and contains additions to Resource 22. Take time to give emphasis to the key ideas in Resource 24.
10 min.	3. Introducing Procedure 22	P21 P22 P23	3. Call attention to Procedure 21, premeeting assignment, and review Procedure 22 with participants. Take time to explain each part of the procedure.
60 min.	4. Preparing the case study	P21 P22 P23	*4. Tell trainees to proceed with Procedure 22, Part I and Procedure 23.
90 min.	5. Reconstructing intervention theory	P22 P23 R22 R24	5. Tell trainees to proceed with Procedure 22, Part II and Procedure 23. Form trios of TU across LG. Give each TU in a trio a number from one to three. Ask them to exchange cases within a trio as follows: TU2 gives case to TU1 TU1 gives case to TU3 TU3 gives case to TU2

*NOTE: It would be extremely advantageous in doing Steps 4 and 5 if some copying facility (Thermofax or Xerox) could be available.

Time	Steps	Materials	Directions
3 hours	6. Reporting and dialogue	P22 P23	6. Ask trainees to proceed with Procedure 22, Part III. Present on newsprint a chart of the three rounds in Part III of Procedure 22, identifying each TU on the chart to facilitate the round. Use the diagram below.



Before starting its report, each TU should give a copy of the reconstructed theory to observers.

INSTRUCTIONAL STRATEGY: INTRODUCING THE PROCESS OF DESIGNING

Time	Steps	Materials	Directions
5 min.	1. Introducing Activity 14	A14	1. Review the agenda for Activity 14 with participants.
20 min.	2. Introducing Resource 25	R25	2. Introduce the idea of designing as a basic area of skill for consultants and interventionists. *Distribute a copy of *The Universal Traveler* to each participant. (Resources 25 and 26) Tell the participants to read pages 16-28 in *The Universal Traveler* listed on Resource 25. Say this is an introduction to the process of designing.
10 min.	3. Forming design teams		**3. Announce that at this time design teams will be formed. Say that the only thing the trainer wants to insist on is that the teams consist of <u>two</u> persons. Indicate the reason is <u>expediency due to time constraints</u>. Invite the trainees to indicate any preferences they have for a teammate and to do any negotiating needed.

*NOTE: This book may have been purchased by participants during the pretraining orientation meeting.

Koberg, Don and Jim Bagnall. *The Universal Traveler.* Los Altos, California: Kaufmann, 1974.

**NOTE: In case of a group of more than 12 participants, form teams so there are no more than six teams to report.

Time	Steps	Materials	Directions
20 min.	4. Warming up to creative problem solving		4. Give each team a sheet of newsprint and a pen. Tell them to take one minute and write all the ways they can think of to use a: - Paper clip - Rubber ball in the house - Aluminum foil outside the house - Ball point pen
10 min.	5. Introducing Procedure 24 and Resource 26	P24 R26	5. Review Procedure 24 with the participants, reinforcing the reporting and discussing aspects of the instructions. Call attention to suggested pages on Resource 26 and say it is an elaboration of Resource 25.
4-5 hours	6. Designing an event	P24 R25 R26	6. Instruct participants to follow guidelines in Procedure 24.
2 hours	7. Sharing and discussing designs and experiences	P25	7. Convene the group and review Procedure 25 calling particular attention to the ground rules. Ask trainees to take 2 minutes to reflect about the questions on Procedure 25 before beginning the discussion.

INSTRUCTIONAL STRATEGY: PLANNING ORGANIZATIONAL DEVELOPMENT WORK (IV)

Time	Steps	Materials	Directions
5 min.	1. Introducing Activity 15	A15	1. Present the agenda for Activity 15.
15 min.	2. Introducing Procedure 26	P26 P27 R26 R25 R26	*2. Make announcements pertaining to the fifth meeting and the gala celebration the evening of the third day. Build expectations about terminating the training, or continuing the OD project. Announce that Procedure 28, Premeeting Assignment for Summarizing PETC-III Organizational Development Work, should be filled in and brought to the final meeting. Review Procedure 26 with participants. Emphasize that this planning session provides the opportunity to put into operation many of the ideas and concepts found in Resource 22 and 24, Resource 25, The Design Process as a Problem-Solving Journey, and Resource 26, The Universal Travel Agency. Call attention to Resource 27, List of PETC-III Resource Papers. Announce that the work in LG will focus on how well the TU has taken into consideration the concepts and ideas about intervention theory and design process.
3 hours	3. Planning OD work	P26	3. Ask participants to work in TU and follow instructions on Procedure 26.

*NOTE: Between meetings, remember to mail memos to participants reinforcing premeeting assignment.

INSTRUCTIONAL STRATEGY

Activity 15
Fourth Meeting

Time	Steps	Materials	Directions
3 hours	4. Reporting plans	P26	4. Ask TU to report plans in LG following guidelines in Procedure 26, Part II.

INSTRUCTIONAL STRATEGY: REVIEWING ORGANIZATIONAL DEVELOPMENT WORK

Time	Steps	Materials	Directions
5 min.	1. Introducing Activity 16	A16	1. Welcome the participants to Meeting 5 in any way that seems appropriate. Provide an overview of the four agendas for the meeting. Review the agenda for Activity 16 in detail.
15 min.	2. Introducing Procedure 29	P28 P29	*2. Review Procedure 29, Final Report of Organizational Development Work, and emphasize the importance of the home assignment (Procedure 28). Announce that this will be the final session in which consideration will be given to the OD projects. Say that the work done in the rest of the meeting will focus on the individual trainee as consultant. Suggest an appropriate time schedule.
90 min.	3. Summarizing OD work	P29, Part I P28 **CI	3. Direct trainees to proceed with Part I of Procedure 29. Tell them to manage their own time. Say that you will check with each TU in one hour and 15 minutes to alert them to the need to move to Step 4.

*NOTE: Procedure 28, Premeeting Assignment for Summarizing PETC-III Organizational Development Work, will be the basis for work on Procedure 29.

**NOTE: Chapter II, Understanding the Organization As a System, pages 55-69 and 102-108; Figure 11, page 127; Figure 14, page 174.

Time	Steps	Materials	Directions
2-3 hours	4. Preparing final report of OD work	P29, Parts I and II P1, Meeting 1 R2 R3	4. Visit each TU to check for needed clarification of Procedure 29, Part II. Remind them to review Resource 2, Critical Issues in the Phases of Consultation and Resource 3, Tailoring Organizational Development for Schools. Remind the TU of the time at which the LG meeting will start.
3 hours	5. Presenting final reports	P29, Part III	5. Meet with the LG and participate as appropriate. Keep time.

INSTRUCTIONAL STRATEGY: EVALUATING INTERVENTION STRATEGIES AND TECHNIQUES

Time	Steps	Materials	Directions
5 min.	1. Introducing Activity 17	A17	1. Review purposes, objectives and steps.
15 min.	2. Introducing Procedure 30	P30	2. Read Procedure 30, Evaluation of Intervention Strategies and Techniques, with participants. Take time to go over the steps, procedures and guidelines. Provide necessary elaborations and clarifications. Ask participants to form teams of two persons each. Encourage people to get together with people they have not worked with. Assign each team one of the resources listed on Procedure 30, page 4.
4 hours	3. Studying assignments and preparing presentation	P30, Part I	3. Tell participants to complete the work called for in Part I of Procedure 30.
6 hours	4. Making presentations	P30, Part II	4. Review Part II of Procedure 30 with the participants and conduct the presentation sessions.

INSTRUCTIONAL STRATEGY: CONSTRUCTING OWN DIFFERENTIAL INTERVENTION MATRIX

Time	Steps	Materials	Directions
5 min.	1. Introducing Activity 18	A18 R29	1. Review purposes, objectives and steps for Activity 18. Collect Resource 29 from the participants.
15 min.	2. Introducing Procedure 31	P31 R28	2. Read Procedure 31, Construction of a Differential Intervention Matrix, with trainees. Clarify and elaborate each step they will take in order to construct their own DIM. Remind them that they would not be in PETC-III if they were not already able to do a number of intervention strategies, techniques and procedures. Call attention to Resource 28, Intervention Chart.
90 min.	3. Constructing own DIM	P31 Newsprint	3. Ask them to work individually and consult with others when needed. Request that appointments be made with others they wish to consult. Emphasize that the product achieved through this activity has the potential to be a handy dandy quick reference of their "collection" of interventions. This "collection" should influence intervention decisions in future consulting.
30 min.	4. Inspecting matrices		4. Ask them to display their DIM for the total group to see, inspect, ask questions.
90 min.	5. Sharing and discussing matrices		5. Ask them to share and discuss their DIM work in the LG or in the total group.

Time	Steps	Materials	Directions
	6. Gala celebration		6. Conduct a gala celebration. This celebration can take various forms and can be held immediately following Step 5 or at any other time convenient to the schedule. For example, before-dinner snacks and drinks, a dinner, after dinner dessert, budget lunch. During the gala take Polaroid pictures of each participant for use in Activity 19--attach them to copies of Resource 29. Do not reveal the reason for taking the pictures.

INSTRUCTIONAL STRATEGY: BUILDING A FUTURE FOR YOUR CONSULTANT SELF

Time	Steps	Materials	Directions
30 min.	1. Introducing Activity 19	A19	1. Briefly review the agenda for Activity 19, emphasizing the nature of the session as a training exit.
15 min.	2. Introducing Procedure 32	P32 R28 R29 R30 R31	2. Read Procedure 32, Your Future as a Consultant, with participants. Take time for needed clarifications. Distribute Resource 29 and call attention to the usefulness of Resource 30 and Resource 31. Also call attention to Procedure 17, 18 and 31 as helpful resources for this task.
60 min.	3. Writing statements about present and future consultant self	P32 P17 P18 P31 Chart	3. Instruct participants to proceed with Part I of Procedure 32. During this time post the large appointment chart (see Instructional Supplement) you have prepared ahead of time.
3½ hours	4. Making appointments; interviewing and being interviewed	P32	4. Encourage participants to record their appointments. Say this will reduce confusion and overlapping appointments. Remind people to block out time for both persons in an interview time block. Be ready to help with getting appointments clarified.
60 min.	5. Reflecting and restating	P32, Part III	5. Instruct participants to proceed with Part III of Procedure 32. Reinforce the importance of writing the 1-minute statement called for.

Time	Steps	Materials	Directions
60 min.	6. General discussion		6. Convene the total group in a discussion setting. Start the discussion by asking each person in turn to read his/her statement. Continue the discussion as long as it seems productive. Close the discussion and training in any way which seems appropriate at the time.

APPOINTMENT CHART

TIME	NAMES (alphabetically to expedite matters)							
3:15								
4:00								
4:45								
8:30								
9:15								
10:00								
10:45								

ADDITIONAL PARTICIPANT MATERIALS

This section contains a sample of all additional materials used with participants in the PETC-III workshop conducted in Seattle between February 1 and July 11, 1975. Included are sample orientation materials and preworkshop assignments which were distributed during a one-day orientation meeting held 30 days prior to the start of the first meeting of PETC-III. The training design calls for each participant to receive a mailing between each of the training meetings. The purpose of these mailings is:

To maintain contact with the participants

To provide information about the next meeting

To make assignments

To provide additional resources and input

Northwest
Regional
Educational
Laboratory

710 S.W. Second Avenue • Portland, Oregon 97204 • Telephone (503) 248-6800

ANNOUNCEMENT OF ORIENTATION MEETING

Subject: PETC-III, Organizational Development Training

We are pleased to know that soon you will be ready to participate in the PETC-III training sponsored by the Seattle School District.

The preliminary agreements between the school district and the Northwest Regional Educational Laboratory (NWREL) have been reached and the dates for the five meetings have been confirmed. The list of dates is attached to this letter.

An orientation session has been scheduled to be held at Rainier Beach High School, Pod #3 on February 1 from 9:00 a.m. to 4:00 p.m. At this meeting we will accomplish the following:

1. Discuss and clarify all system's requirements and agreements. See orientation material attached.

2. Form basic training groups.

3. Complete the three-way agreement required to participate in PETC-III, including the identification of possible client systems. The agreement will be signed by you, NWREL, and the District Representative authorizing your participation. A copy of the three-way agreement is attached for your information.

4. Receive and clarify assignments to be completed before the first meeting. These preworkshop assignments will be presented and carefully explained by the PETC-III trainers. The success of the activities in the first four days of training, Meeting 1, depend entirely on your completion of these assignments.

5. Respond to your questions about the training and provide information about books to be purchased.

We are encouraged by the possibility that Wade Haggard and Hal Reasby may be able to spend a couple of hours with the total group on February 1 to clarify the three-way agreement.

SAMPLE

If you need any information about participating in PETC-III training before the orientation session on February 1, please call COLLECT Bill Ward at (503) 248-6868. In case Bill is out of the office, ask for either Ruth Emory or René Pino, PETC-III trainers.

We want to express our appreciation for all the work you have done throughout this period of preparation for getting PETC-III training off the ground. We look forward to meeting you personally and working with you.

Sincerely,

SAMPLE

William T. Ward
Coordinator
Office of Field Relations
and Dissemination
Improving Teaching Competencies
Program

Ruth Emory
Staff Specialist
Improving Teaching Competencies
Program

René F. Pino
Staff Specialist
Improving Teaching Competencies
Program

RFP:lob

PETC-III "SEATTLE B"
Meeting Schedule
1975

First Meeting:	Saturday, February 22 Sunday, February 23 Monday, February 24 Tuesday, February 25
Second Meeting:	Thursday, March 27 Friday, March 28 Saturday, March 29
Third Meeting:	Thursday, May 8 Friday, May 9 Saturday, May 10
Fourth Meeting:	Sunday, June 1 Monday, June 2 Tuesday, June 3
Fifth Meeting:	Tuesday, July 8 Wednesday, July 9 Thursday, July 10 Friday, July 11

SAMPLE

THREE-WAY AGREEMENT

The following are agreements mutually arrived at by the persons signing them. They represent expectations of all concerned and provide the necessary clearances for the trainees to conduct an organizational development project as the practicum for training in the NWREL instructional system Preparing Educational Training Consultants: Organizational Development (PETC-III). These agreements serve the purpose of clarifying expectations and are not legally binding.

A. PETC-III participant agrees to:

1. Complete preworkshop assignments which will be mailed one month prior to the first training meeting and which will take about eight hours.

2. Participate in a total of 17 days of training sessions over a period of six to eight months as follows:

First Meeting:	Four days, each day 9:00 a.m. to 5:00 p.m.
Second, Third, Fourth Meetings:	Three days, each day 9:00 a.m. to 5:00 p.m.
Fifth Meeting:	Four days, each day 9:00 a.m. to 5:00 p.m.

3. Identify broadly a need for change or improvement, or a well-specified area of need in the organization before the training starts.

4. Design and conduct an organizational development project which will require about ten days of work to complete, making plans during the training sessions and implementing them in the time between training meetings (about 45 days).

5. Come to agreements with the organization about how financial requirements are to be met.

SAMPLE

_____
Name

_____
Name

_____
Name

77

B. Official representative of the organization authorizing the training of the PETC-III participants agrees to:

1. Authorize each participant to spend time as follows: 8 hours of preworkshop assignment, 17 days of training meetings and about 10 days conducting the project.

2. Check with participants about arrangements for other expenses, such as the purchase of one or two resource books, clerical expenses necessary to conduct the project, travel and expenses for attendance at the training meetings, etc. (Five trips = 17 days)

3. Provide necessary communication within the organizational unit involved to legitimize the activity of the participant while conducting the project. This communication may take the form of a memo, or a meeting with those affected, or any other means of communication which will make clear the support of the participant by the organization authorizing the organizational development activity and their expectation that cooperation will be given by the organizational unit in which the project is being conducted.

_____, for
Name

_____
Organization

_____
Position

SAMPLE

C. The Training Organization agrees to:

1. Negotiate initial organizational entry to establish support for the participant.

2. Conduct the training design, which includes preworkshop assignment, 17 days of training meetings.

3. Provide all training materials.

4. Make arrangements for the place in which training meetings will be conducted.

5. Provide additional resources as appropriate to the training design and as needed by participants.

_____
Trainer/Installer

_____
Trainer/Installer

INTRODUCTION TO PETC-III TRAINING

Objectives and Requirements

This document is written to be used by potential participants in PETC-III: Organizational Development training, by the organization in which the participant will be working, and by the installers of the training. It contains information to be taken into account when reaching agreements with all the parties involved in the training. It sets forth what is expected of all those affected by the training and what is involved in participating in a PETC-III program.

PETC-III: Organizational Development is the third unit in the Preparing Educational Training Consultants program of the Improving Teaching Competencies Program of the Northwest Regional Educational Laboratory (NWREL). Potential participants have met all the prerequisites to be eligible for this training. The prerequisites include completion of PETC-I: Skills Training, PETC-II: Consulting, and participation in the following NWREL programs: Research Utilizing Problem Solving (RUPS), Interpersonal Communications (IPC), Interpersonal Influence (INF), and System Approach for Education (SAFE).

PETC-III Training Plan

PETC-III training is spread over a time period of six to eight months. During this period the trainee will do the equivalent of one day of preworkshop assignment, attend seventeen days of training meetings, and spend a minimum of ten days conducting an organizational development project. It is possible that a trainee may conduct a project in an organization other than his own, although this is not the

preferred route for the training. The time spread for the training is approximately as follows:

> The first meeting will start with an evening session in cases where a full day of orientation cannot be held, followed by four days of training sessions from 9:00 a.m. to 5:00 p.m.

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8
preworkshop assignment, 1 day	4-day workshop meeting	3-day workshop meeting		3-day workshop meeting	3-day workshop meeting		4-day workshop meeting

NOTE: There are approximately 30 to 35 days between workshop meetings for OD project work with client groups.

PETC-III Costs

The chief costs of PETC-III training are time and energy. The participant will spend about 38 days in the training. Expenditure of energy comes with the work required which includes attending all meetings, studying, planning the project, participating in the critiquing of the work of other trainees, conducting the project, developing and maintaining organizational relationships appropriate to the project.

In addition to time and energy there is a moderate cash outlay needed. The participants will be asked to buy at least two books, totaling between $20 and $25. Probably there will be expenses involved in duplicating materials used in conducting the project. If the training meetings are held in a place away from the residence of the participant, expenses will need to be provided for. It is expected that the trainees and the organization will work these matters out.

The training materials will consist of a theory book of central ideas and the participant materials. The central ideas book contains the major theoretical and knowledge inputs for the training. The participant materials contain procedure sheets needed by the participants during the training as well as resource sheets for designing and conducting the project.

What the Organization Gains for Its Investment in PETC-III Training

The organization gains a new functional capacity through its new OD consultants to diagnose system needs and to produce appropriate OD interventions. The OD consultant is prepared to do the following for the organization:

Involve the organization in the diagnosis of change needs and in the identification of a change effort

Help the organization to stay focused on normative and structural change if the organization so desires

Manage the implementation of plans to bring about an increased functional capacity of the organization

Either bring about an end to the consulting relationship or to involve the organization in the identification of next steps for organizational development

Apply his knowledge to more complex organizational change efforts as he progressively experiences more opportunities for acting in the organizational development consultant role

Use concepts in PETC-III to make statements about the organization's health and maturity

Manage the change efforts, and decide on appropriate interventions, based on data collected

Assume a variety of consulting roles to facilitate movement toward improvement; he will be able to shift between several roles

Analyze his own values and ideological base for consulting, assess his professional growth needs and establish professional growth goals

In order to help the organization achieve its change objectives the trainee will be able to:

Use a systematic approach to change by applying the Lippitt model of phases of planned change to manage the change effort

Apply a diagnostic matrix and an intervention matrix as taught in PETC-II and PETC-III to help him determine the most accurate and appropriate analysis of the organizational situation and the most relevant interventions for him to take

Draw on prior training and experience for help in designing and implementing interventions

The prior training and experience of the PETC-III trainee will enable him/her to:

Use and teach others to use Research Utilizing Problem Solving (RUPS) skills

Use and teach others to use basic Interpersonal Communication (IPC) skills

Use and teach others to use the basic concepts and processes of Interpersonal Influence (INF)

Conduct Group Process Skills (GPS) workshops and teach others to conduct them

Use consulting skills to provide or strengthen a function needed by a client system to achieve a goal or reach an objective

How well the PETC-III trainee performs will depend upon:

His/her own desire and motivation to perform well

The extent to which he is seen and accepted in his organization as being in the role of organizational development consultant

The degree of opportunity available for utilizing his/her skills

How much the PETC-III trainee will know about organizational development consulting will depend upon:

The extent to which the training enables him to conceptualize the role of consultant

How much practice his organizational development project gives him in applying the PETC-III OD concepts

How soon after the completion of the training he can apply his knowledge to another organizational effort

PETC-III Installation and Training Requirements

Authorization to Participate. An organization must authorize an individual participant or a team of participants, to participate in the five training meetings and to conduct an organizational development project.

An organizational development project focuses on the organization (not individuals, committees or groups of individuals) with a view toward building into and maintaining improved ways of functioning within the organization. The project is a series of interventions based on data collected and analyzed which aims at structural and normative changes to improve the functioning of the organization. A project may be conducted in one part of the organization or in the organization as a whole. An organizational development project becomes possible when the organization's needs and desires have the potential for providing new or increased areas of functional capability.

Selection of Participants. There are two options for the selection of participants. The options are listed below, in order of their preference for the training.

1. A team of two persons from one organization, as internal consultants

2. A team of two individuals not representing their own organization, but wishing to work as a team of external consultants to an organization, and having contracted with an organization for such work

Each team of two persons will be called a training unit during the PETC-III training.

Conducting an OD Project. Each training unit must design and conduct an organizational development project. The OD project is the practicum for PETC-III training, as conducting a Group Process Skills workshop and the consultation with a client system provided practical experience for PETC-I and PETC-II respectively. Here are a series of statements which are intended to clarify what a PETC-III OD project is.

The statements should also function as a guideline as plans are made and carried out. It should be noted that the following statements apply to PETC-III and may or may not have relevance for other organizational work done by PETC-III participants.

> The concept, "project," is defined as a series of intervention strategies which adhere to the guidelines provided in the Phases of Planned Change and are based on the theoretical framework of a differential diagnostic matrix and differential intervention matrix.
>
> A PETC-III OD project begins with the signing of three-way agreement by the consultant, the person in the organization authorizing the consultant and the training agency. Part of the agreement includes either a broad identification of a need for change or a well-specified area of need.
>
> The project is undertaken with the conviction that the objective of PETC-III for improving the functional capability of the organization is relevant and appropriate to the organization and that the OD work initiated by the consultant is clearly aimed at achieving this objective.
>
> A PETC-III OD project project consists of <u>all</u> the activities carried out by the consultant-in-training during the six-month period of PETC-III training. It does <u>not</u> refer to one activity (e.g., a workshop, a laboratory, a confrontation meeting) or a needs assessment. The scope and extent of these activities are determined by the time constraints of the training (17 days training, 10 days minimum project work).

<u>Completing Preworkshop Assignment</u>. In order to be able to start the first meeting of PETC-III it will be necessary for each training unit to complete a preworkshop assignment. This preworkshop assignment will be mailed to the training units one month prior to the <u>first training meeting</u>, and will require approximately eight hours to complete.

The assignment will consist of several tasks, such as: reading to be completed, gathering information about the structure and functions of the organization and of a subsystem in which work may take place, conducting interviews with the key persons.

A Three-Way Agreement

A vital step in recruiting participants for PETC-III training is the achievement of a three-way agreement among the potential trainees, the authorizing organization and the training organization (in this case the Improving Teaching Competencies Program of NWREL). The reasons for achieving such an agreement are:

To achieve clarity about expectations

To assure organizational support for the conduct of an OD project

To reduce misunderstandings during the training period

To ensure that trainees will have the time and resources needed to do their practicum

To legitimize the trainees' efforts at making interventions

With this in mind, agreement forms have been prepared. Signing the forms will indicate that all the parties are satisfied that they understand what is involved and agree to it.

INTRODUCTION TO PREPARING EDUCATIONAL TRAINING CONSULTANTS: ORGANIZATIONAL DEVELOPMENT (PETC-III)

Preparing Educational Training Consultants: Organizational Development (PETC-III) is one of several instructional systems developed by the Improving Teaching Competencies Program (ITCP) of the Northwest Regional Educational Laboratory (NWREL). The material of this system includes training strategies and procedures plus participant instructional materials for use with educational managers in a workshop setting. PETC-III provides participants with the opportunity to acquire the knowledge, skills and sensitivities that constitute a change process termed Organizational Development (OD).

What is OD?

Organizational development is a strategy for organizational change. It is a set of practices that have evolved in industrial, governmental and (more recently) educational settings. The purpose of organizational development is to improve organizational health and effectiveness.

Organizational development aims to help people increase their competencies so they can more effectively manage the human component of their organizations. The basic strategy of organizational development is to provide training and consultation that involve managers in identifying, diagnosing and modifying the norms, structures and processes of their own organization. Through these normative, procedural and structural changes, it is intended that the organization's effectiveness and health will be improved.

Organizational development is based on pieces of theory emanating from the models of "planned change" (Lippitt, Watson and Westley, 1958;

Havelock, 1969, 1972) and "action research" (Lewin, 1947; Coch and French, 1948). It also incorporates intervention strategies tested by Seashore and Bowers, 1970; Schmuck and Runkel, et al., 1972.

Beckhard (1969) defines OD as an effort (a) planned, (b) organization-wide, and (c) managed from the top, to (d) increase organization effectiveness and health through (e) planned interventions in the organization's processes using behavioral science knowledge.

Organizational development cases involve such things as (a) problems of communication (particularly upward), (b) intergroup conflict, (c) leadership issues, (d) questions of identity and destination, (e) questions about satisfaction and the ability of an organization to provide adequate and appropriate inducements and (f) questions of organizational effectiveness.

These can be grouped into three categories:

1. Problems of destiny--growth, identity and revitalization
2. Problems of human satisfaction and development
3. Problems of organizational effectiveness and organization health

The rationale for preparing organizational development consultants inside organizations (especially schools) includes three current situations:

1. Few school organizations have the financial resources to hire outside organizational consultants over long periods of time
2. The number of available outside organizational consultants is inadequate to meet the need
3. Consultants that belong to the organization are already committed to its improvement, are likely to be accorded trust and respect from their peers, and are already familiar with existing norms, structures and procedures

PETC-III, therefore, is planned as an instructional strategy by which organizations can build their own capacity to carry out organizational development. It utilizes regular staff members on a continuous basis and provides organizational development training and consultation as needed to maintain expected levels of capabilities for all managers, leaders and supervisors or any other change agent role.

Description of Materials and Strategies

The system consists of a set of participant materials, a set of instructional strategies to be used with trainees, some preliminary plans for installing a PETC-III training program, and strategies to help those trained in PETC-III provide organizational training and consultation for client groups.

The immediate population for PETC-III training consists of educators, at any level, who are desirous of acquiring the knowledge and skills that will allow them to provide organizational training and consultation to school groups. The secondary target population consists of client groups who wish to receive organizational development training and consultation from PETC-III consultants.

PETC-III training is spread over a time period of 8 months. During this period, the PETC-III trainees complete a 1-day preworkshop assignment, attend 17 days of workshop meetings, and spend a minimum of 10 days conducting an organizational development project with a predetermined client group. The following chart outlines the timeline for major training events.

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8
preworkshop assignment, 1 day	4-day workshop meeting	3-day workshop meeting		3-day workshop meeting	3-day workshop meeting		4-day workshop meeting

Note: There are approximately 30 to 35 days between workshop meetings for OD project work with client groups

Strategies require that two persons with considerable organizational development experience and skills conduct the PETC-III workshop. The workshops are structured so that twelve to twenty-seven trainees, divided into two or three teams, go through the training together.

Goals and Outcome Objectives. The goals and objectives for PETC-III are divided into two categories, (a) consultant outcome goals and objectives, and (b) goals and objectives for client groups. The consultant outcomes include their satisfaction with the training, their perceptions of its utility, and changes in their behavior such as increased cognitive growth and performance change.

Consultant Outcome Objectives. The PETC-III instructional system prepares participants to become educational training consultants. As a result of training, consultants are expected to be able to:

1. Identify and explain the major organizational development conceptualization and intervention strategies that are presented in the PETC-III instructional system
2. Meet with a potential client group and translate this group's difficulties into a specific problem or problems on which the group wishes to work
3. Establish definite and workable relationship and contract with a client group
4. Collect information from the client group so that the group's problem(s) may be diagnosed and clarified
5. Design, provide and assess the effectiveness of intervention activities that allow the client group to explore and examine alternative norms, processes and structures

6. Design, provide and assess the effectiveness of intervention activities that allow the client group to accomplish normative, procedural or structural changes resulting in increased functional capability in the organization

7. Achieve a terminal relationship with the client group by gradual withdrawal and by establishing structures and procedures to substitute for the services provided by the consultant

At another level, however, it is possible to predict observable changes in a client group that receives consultation. Four specific examples follow.

Improved Problem-Solving Capabilities. As a result of training in organizational development, client groups may become more adept at problem solving. They may become more able to:

Sense problem situations

Differentiate between kinds of problems

Attend to problem situations with shared and explicit problem solving procedures

Improved Management of Interpersonal Processes. As a result of training in organizational development, client groups may become more adept at combining people's efforts to achieve desired task goals. It is expected that:

Vertical and horizontal communication may become more open, shared and accurate

Influence may become more shared and equalized

Decision making may become more diffused, characterized by explicit procedures and involvement of those who will be affected by or who are responsible for implementation of the decisions

Coordination may become more explicit and accepted

Improved Procedures that Support Personal and Professional Growth. As a result of training in organizational development, client groups

may become more adept at viewing personal and professional development as an ongoing function necessary to the growth of the group. Therefore, it is expected that the group may provide:

Increased training opportunities for members to meet new organizational needs

Increased learning resources so members can be continuous learners

Increased feedback, formally and informally, so members can move toward new ways of understanding

Improved Ways the Organization Attributes Meaning. As a result of training in organizational development, client groups may become more adept in the ways they see and explain themselves to the rest of the world. It is, therefore, expected that the group will:

Have goals which are clear and in which members have a sense of ownership

Respond appropriately to outside demands

REFERENCES

Beckhard, R. *Organization Development: Strategies and Models.* Reading, Massachusetts: Addison-Wesley, 1969.

Coch, L. and J. R. P. French. "Overcoming Resistance to Change." *Human Relations.* 1:512-532;1948.

Havelock, R. G. *The Change Agents Guide to Innovation in Education.* Englewood Cliffs, New Jersey: Educational Technology Publications, 1973.

Havelock, R. G. in collaboration with Alan Guskin. *Planning for Innovation Through the Dissemination and Utilization of Knowledge.* Ann Arbor, Michigan: Institute for Social Research, the University of Michigan, 1969.

Havelock, R. G. and M. C. Havelock, in collaboration with the Staff and Participants of the Michigan Conference on Educational Change Agent Training, CECAT. *Training for Change Agents: A Guide to the Design of Training Programs in Education and Other Fields.* Ann Arbor, Michigan: Institute for Social Research, University of Michigan, 1972, 206 pp.

Lewin, K., *Field Theory in Social Science.* D. Cartwright, ed. New York: Harper, 1951.

Lippitt, R. G., J. Watson and B. Westley. *The Dynamics of Planned Change.* New York: Harcourt, Brace, 1958.

Seashore, S. E. and D. G. Bowers. *Changing the Structure and Functioning of an Organization: Report of a Field Experiment.* Ann Arbor, Michigan: Institute for Social Research, Monograph 33, 1970.

Schmuck, R. and P. Runkel, et al. *Handout of Organization Development in Schools.* Palo Alto: Mayfield Publishers, 1972.

PETC-III "SEATTLE B"
ORIENTATION MEETING*

Time	Steps	Directions
45 min.	1. Warm up introductions	1. Paper/pencils; reflect/write related to PETC-III, what three wishes I want. Share with four others; do not meet with partners.
20 min.	2. Meet in training unit	2. Form training unit (TU), negotiate. Share reflections/wishes, build fantasy of an OD team to be shared in first meeting of learning groups (LG). Identify and write, "What is not clear about this training."
30-45 min.	3. Presentations	3. Review orientation piece, schedules, requirements, full attendance, meeting dates, what is a project, acceptable client system, log, evaluation, data collection, how the training goes between meetings, three-way agreements, outcomes.
30-45 min.	4. Presentations	4. Present preworkshop assignment materials: Data collection entry issues Distribute central ideas book. Make announcements about availability of Handbook and Organization Development in Schools ($20.00).

SAMPLE

*Adapted from Instructional Strategies, Activity 1, Meeting 1

Time	Step	Directions
15 min.	5. Consider issues of training unit relationships	5. Consider relationship issues and critical questions for afternoon session and three-way agreement.
	6. Three-way agreements	6. Negotiate the three-way agreements with organization's administrators.

SAMPLE

READING ASSIGNMENT FOR FIRST MEETING

Enclosed is the central ideas book for PETC-III, *Organizational Development in Education*.

Please read the following assignments in preparation for the first meeting of PETC-III.

1. Chapter IV of the central ideas book. This is a review of PETC-II concepts.

2. The following sections of Chapter II:

   Definitions and Concepts of Systems, page 47 through Growth, Evolution and Maturation of Human Systems, page 54

   The Concept of Organizational Health, page 68 through The Organization as a Human System, page 79

   Organizational Boundaries of a School System, pages 109-113

3. The following sections of Chapter III:

   The Organization as the Client, page 117 through Recognizing Effects of Values and Biases, page 137

   Identifying and Defining System and Subsystem Boundaries, page 152 through Changing Norms in an Organization, page 166

Also enclosed is the reference book:

Jones, John E. "The Sensing Interview," from *1973 Annual Handbook for Group Facilitators*. J. W. Pfeiffer and J. E. Jones, editors. La Jolla, California: University Associates, 1973.

INTRODUCTION TO PREWORKSHOP ASSIGNMENTS

The assignments you are about to complete will undoubtedly have continuing effects as you proceed with your PETC-III project. Since you have not, in fact, attended the first PETC-III Training Meeting it may be difficult or confusing to understand the reasons for and importance of the particular assignments.

Here are two things to keep in mind. They may give you a framework within which to understand the assignments.

You may recall the emphasis placed on a diagnostic orientation in PETC-II. You were asked repeatedly to collect information and apply the dimensions of a diagnostic matrix before selecting an action to take in any practicum event. These assignments continue the information collection aspect of that data-based diagnostic orientation

Throughout PETC-III you will have fundamental concern for five questions. We offer them here for your information. Although your initial data collection may produce few clues as to their answer, they may be of assistance to help you see where you are heading:

1. Are the learning goals of PETC-III: Organizational Development appropriate to your organizational work?

2. To what extent do the goals relate to improving the effectiveness of the client system?

3. Is the cultural state of the client system ready for organizational development?

4. Are the key people in the client system involved in or informed of the organizational development program?

5. Are members of the client system adequately prepared and oriented to organizational development?

In PETC-III you will be doing your work within the same Phases of Planned Change model you used in PETC-II. Keep in mind that in your preworkshop assignment you are working at Establishing a Client Relationship and at the initial stages of Developing an Awareness of a Need for Change. You can depend on it that neither of these steps will be completed before the First Training Meeting, but will be worked on from time to time as needed in your OD experience.

ASSIGNMENT ONE
CHARTING TOTAL ORGANIZATION

1. Prepare an organization chart. Include the names of all the parts of your organization, for example: divisions, departments, offices, sections.

2. Identify major parts and major functions.

3. Rate your organization on various dimensions related to boundaries.

4. Refer to operational characteristics in PETC-II differential diagnostic matrix.

   As you have experienced your oganization so far, what would you say are the operational characteristics right now which you would consider as sources of problems in the organization?

   Identify these operational characteristics, including problems and issues related to them.

   What evidence can you give to support your belief that issues/problems exist?

Papers to help with this activity are attached.

ASSESSING MY ORGANIZATION

At the first meeting you will be asked to depict graphically your total organization, showing the major parts, the systems and subsystems, the major external systems and all major functions and shared functions.

Write as much as you can under each item from your own knowledge or from information you are able to collect before first meeting.

MAJOR PARTS

1. *...a system...has parts functioning interdependently to provide a purpose.*

Name the MAJOR PARTS of Your Total Organization	Name the Major Functions

Identify functions which are shared by two or more parts

Any part of a system, which is itself made of parts, is a system within the larger system. We call it a subsystem of the larger system.

Name the Different Levels of Systems and Subsystems	Identify Major Functions

Name the major external systems (external to the total organization)

MAJOR CHARACTERISTICS

The uniqueness of its purpose, its structure, its operating procedures and its expected ways of doing things, or norms, define any particular organization. . . .

The corporate charter and/or existing legislation defines, and limits, the purpose for which the organization may exist and its responsibilities for fulfilling that purpose.

Identify the legal basis of your organization

Identify the kinds of purpose of your organization

Identify the kinds of structure

Identify the operating procedures

Identify the predominant norms

Identify the relationship external to the organization

THE BOUNDARIES OF MY ORGANIZATION

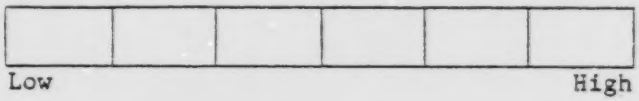
Things which keep an idea, a practice, a role, or an individual IN or OUT of a system.

Actions of the system which represent its choosing to be exposed and influenced by external factors.

Behaviors of the human system that control whether or not something is allowed to become part of its internal decision making.

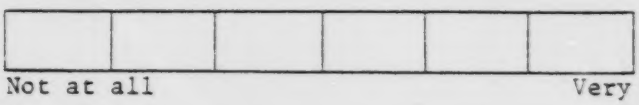
How Would You Rate Your Organization

How permeable is your organization? (Total human system) (in that it exposes itself to many kinds of external influence)



For example:

How vulnerable is your organization? (in that other systems can force their influence on its internal operations)

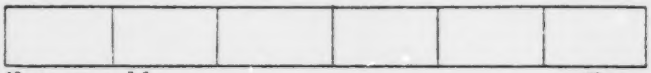


For example:

How flexible is your organization? (in being able to selectively open itself to influence or block such influence based on rapid internal decisions)

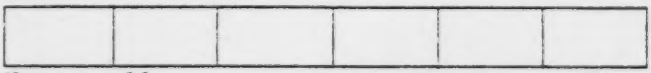
For example:

How rigid is your organization? (in that norms or expectations must be broken in traumatic ways in order to be exposed to something new)



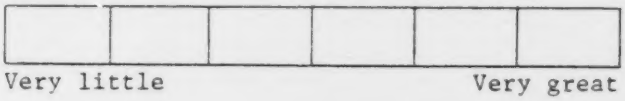
For example:

How planful and rewarding does your organization make the opening of its boundaries?



For example:

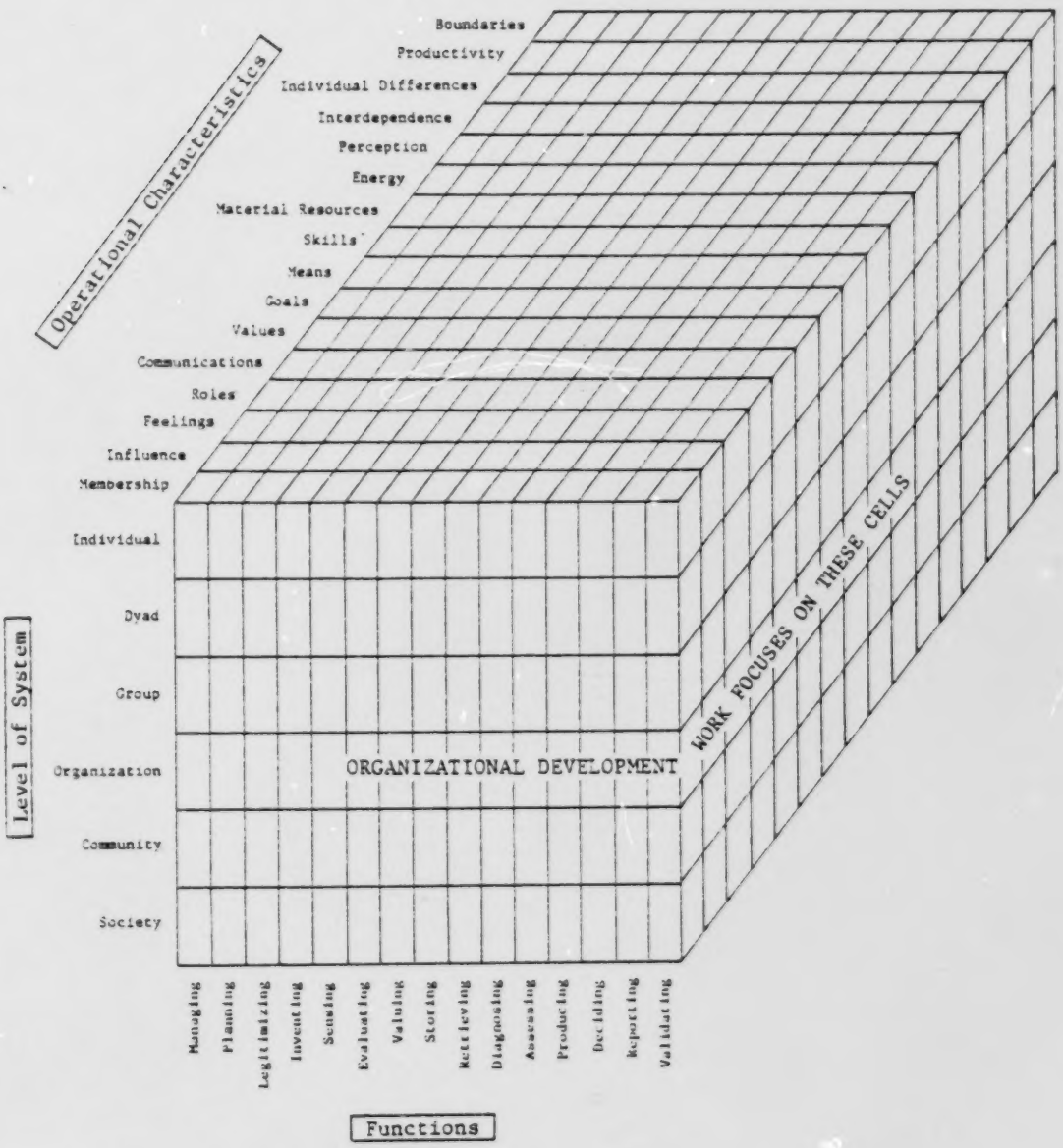
To what extent does your organization understand and acknowledge <u>its own control</u> over its boundaries?



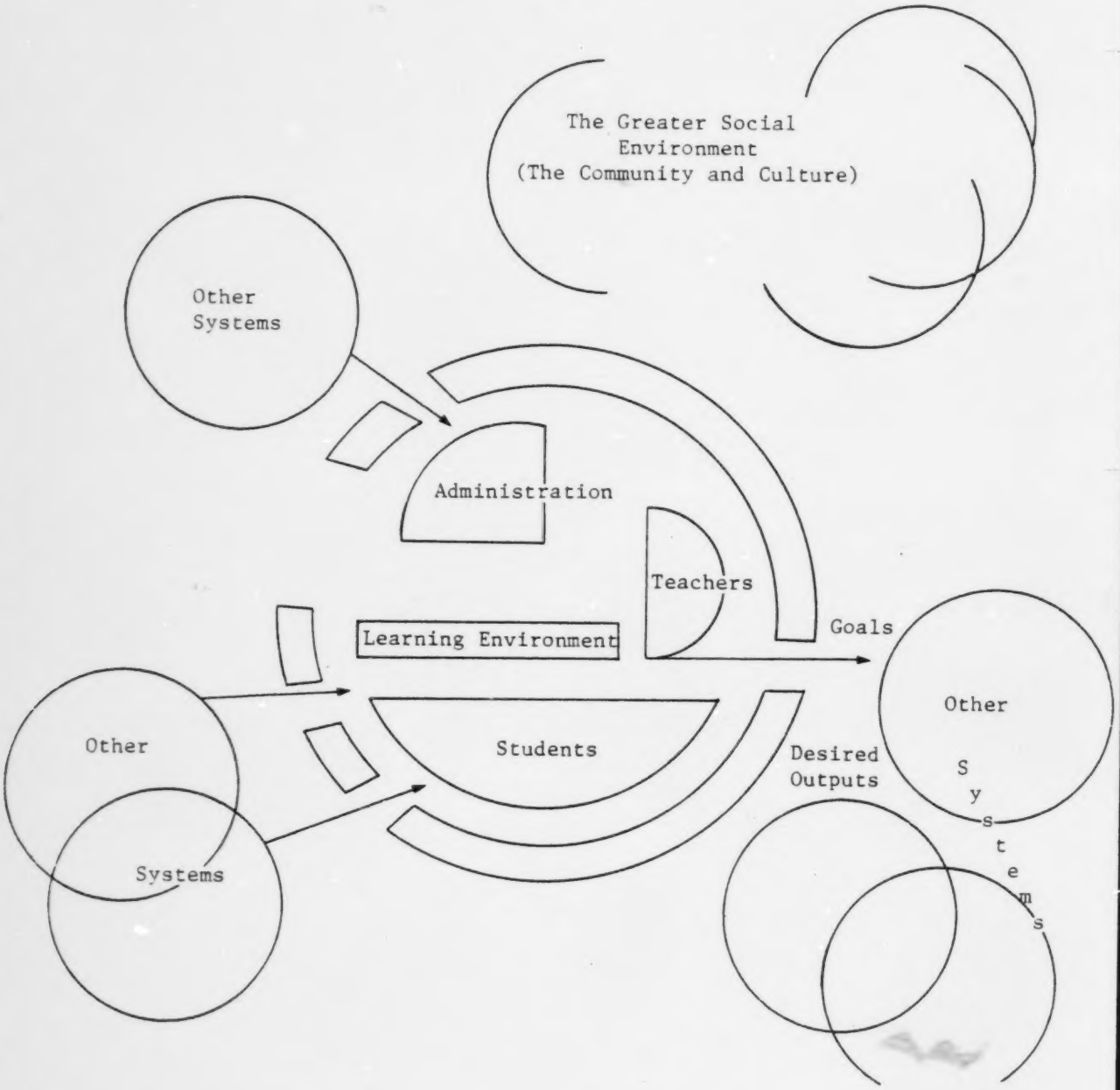
For example:

Who and what act as the gatekeepers of your organization?

DIFFERENTIAL DIAGNOSTIC MATRIX



A DIAGRAM OF A SYSTEM



A system: *A number (two or more) or parts that function individually and in relation to each other to realize a purpose.*

A human system: *One or more persons whose functions are operating interdependently for the purpose of meeting the hierarchy of human needs of people.*

ASSIGNMENT TWO
CHARTING A SUBSYSTEM

1. Prepare an organizational chart for the subsystem in which you are to carry out an organizational development project (if it applies in your case). Include the names of all the parts of this subsystem.

2. Briefly indicate what each part of the SUBSYSTEM does.

3. What is (are) the function(s) of this subsystem?

4. As you have experienced this subsystem what would you say are the operational characteristics right now which you would consider as sources of problems in the subsystem?

   Identify these operational characteristics and related problems.

   Please list evidences to support your judgment that these problems exist.

ASSIGNMENT THREE
COLLECTING INFORMATION

Having information about your organization is essential to proceeding with the training. Doing diagnostic work based on information, which in turn forms interventions, is basic to PETC-III organizational development work. The needed information is secured in a variety of ways.

We recognize the dilemma you face with reference to your need for information. Since you have not yet started the training you perhaps cannot be sure of what you need to know. In addition, collecting information now could produce some unwanted consequences and unnecessarily complicate your relationship with your client later. As a matter of fact, it may affect adversely your entry as an OD consultant. However, we believe that the more information you can bring with you to the first training meeting the better will be your readiness to make plans and take action early in the training.

We suggest that before deciding to collect any kind of data you give careful consideration to any possible effects this activity may have. Since you are asking for permission to do organizational development work and since the organization may not be initiating a request for help, any use of questionnaires or other ways of collecting data may cause confusion. It may become a threat and result in blocking other entry possibilities which could help you and your client establish a relationship.

With this in mind, please consider whether or not it is appropriate or threatening to you and/or your client to collect some kinds of information to bring with you to the first meeting.

If you decide to collect data, two possible ways to proceed are listed below:

1. Conduct interviews with five or six persons in your organization. Get their reactions to the potential benefits of your participation in an OD project. Include the person who authorized your participation in the training.

2. Administer one or more questionnaires to some or all of the persons in your organization. Some examples are attached.

   If you decide to use questionnaires, we suggest that you share the questionnaires with the person authorizing your participation in PETC-III, check with this person the appropriateness of the questionnaires and request a memo by this person to accompany their use. See examples.

Examples:

A. A questionnaire which includes the following:

1. What goes on in your organizational unit that makes it easy or difficult for you to do your job?

My Job

What makes it easy	What makes it hard

2. List two or three things you think are expected of you in this organization.

3. How clear are you about what is expected of you in this organization?

Very clear __ More clear than unclear __ More unclear than clear __

Quite clear __ Quite unclear __ Very unclear __

4. What is the specific thing that your organizational unit is set up to do?

5. If you could change one thing in this organization what would that thing be?

B. Measuring Organizational Climate (Norms)

Organizational Norms

1. Suppose Teacher X feels hurt and "put down" by something another teacher has said to him. In Teacher X's place, would most of the teachers you know in your school be likely to...

   ...tell the other teacher that they felt hurt and put down?

   ( ) Yes, I think most would.
   ( ) Maybe about half would.
   ( ) No; most would *not*.
   ( ) I don't know.

2. ...tell their friends that the other teacher is hard to get along with?

   ( ) Yes, I think most would do this.
   ( ) Maybe about half would do this.
   ( ) No; most would *not*.
   ( ) I don't know.

3. Suppose Teacher X strongly disagrees with something B says at a staff meeting. In Teacher X's place, would most of the teachers you know in your school...

   ...seek out B to discuss the disagreement?

   ( ) Yes, I think most would do this.
   ( ) Maybe about half would do this.
   ( ) No; most would *not*.
   ( ) I don't know.

4. ...keep it to themselves and say nothing about it?

   ( ) Yes, I think most would do this.
   ( ) Maybe about half would do this.
   ( ) No; most would *not*.
   ( ) I don't know.

Schmuck, Richard A. et al. *Handbook of Organizational Development in Schools.* Palo Alto: Mayfield Publishers, 1972. pages 153-156; 264-269; 353-357. (Reprinted by Permission)

C. Determining Management Styles

Preferences of Administrators

There is an old proverb that says, "It may be true what some men say; it must be true what all men say." The problem in applying this to the way people work together in organizations is that all men do not say the same thing. Persons in any organization have different ways of dealing with their work associates in other departments. The proverbs listed in the two questions below can be thought of as descriptions of some of the different possibilities of resolving disagreements as they have been stated in literature and in traditional wisdom.

You are asked to indicate *how desirable in your opinion* each of the proverbs listed below is as a way of resolving disagreements between members of different departments. Please use the following scores in evaluating the desirability of each proverb.

1 Very desirable
2 Desirable
3 Neither desirable nor undesirable
4 Undesirable
5 Completely undesirable

Indicate your evaluation in the spaces below:

___ 1. You scratch my back, I'll scratch yours.
___ 2. When two quarrel, he who keeps silence first is the most praiseworthy.
___ 3. Soft words win hard hearts.
___ 4. A man who will not flee will make his foe flee.
___ 5. Come now and let us reason together.
___ 6. It is easier to refrain than to retreat from a quarrel.
___ 7. Better half a loaf than no bread.
___ 8. A question must be decided by knowledge and not by numbers if it is to have a right decision.
___ 9. When one hits you with a stone, hit him with a piece of cotton.
___ 10. The arguments of the strongest always have the most weight.
___ 11. By digging and digging, the truth is discovered.
___ 12. Smooth words make smooth ways.
___ 13. If you cannot make a man think as you do, make him do as you think.
___ 14. He who fights and runs away lives to run another day.
___ 15. A fair exchange brings no quarrel.
___ 16. Might overcomes right.
___ 17. Tit for tat is fair play.
___ 18. Kind words are worth much and cost little.
___ 19. Seek till you find, and you'll not lose your labor.

___ 20. Kill your enemies with k'.dness.
___ 21. He loses least in a quarrel who keeps his tongue in check.
___ 22. Try and trust will move mountains.
___ 23. Put your foot down where you mean to stand.
___ 24. One gift for another makes good friends.
___ 25. Don't stir up a hornet's nest.

D. Staff Meetings (Openness and Powerlessness)

School districts hold a lot of meetings, and their usefulness depends on their quality. We are thinking specifically of either meetings of the entire faculty of your building *(staff meetings)* or meetings of only a part of the faculty *(committee meetings)*.

Name of the meeting you are considering _____

How often does it usually meet? _____

Length of typical meeting _____

Now please consider what usually or typically happens in this meetings. To each of the items below, assign one of the following numbers.

5 This is *very* typical of this meeting; it happens *repeatedly*.
4 This is fairly typical of this meeting; it happens *quite often*.
3 This is more typical than not, but it *doesn't happen a lot*.
2 This is more untypical than typical, thought it *does happen some*.
1 This is quite untypical, though it *rarely* happens.
0 This is *not* typical at all; it *never* happens.

___ 1. When problems come up in the meeting, they are thoroughly explored until everyone understands what the problems is.
___ 2. The first solution proposed is often accepted by the group.
___ 3. People come to the meeting not knowing what is to be presented or discussed.
___ 4. People ask why the problem exists and what the causes are.
___ 5. There are many problems which people are concerned about which never get on the agenda.
___ 6. There is a tendency to propose answers without really having thought the problem and its causes through carefully.
___ 7. The group discusses the pros and cons of several different alternate solutions to a problem.
___ 8. People bring up extraneous or irrelevant matters.
___ 9. The average person in the meeting feels that his ideas have gotten into the discussion.
___ 10. Someone summarizes progress from time to time.

___ 11. Decisions are often left vague--as to what they are, and who will carry them out.
___ 12. Either before the meeting or at its beginning, any group member can easily get items on to the agenda.
___ 13. People are afraid to be openly critical or make good objections.
___ 14. The group discusses and evaluates how decisions from previous meetings worked out.
___ 15. People do not take the time to really study or define the problem they are working on.
___ 16. The same few people seem to do most of the talking during the meeting.
___ 17. People hesitate to give their true feelings about problems which are discussed.
___ 18. When a decision is made, it is clear who should carry it out, and when.
___ 19. There is a good deal of jumping from topic to topic--it's often unclear where the group is on the agenda.
___ 20. From time to time in the meeting, people openly discuss the feelings and working relationships in the group.
___ 21. The same problems seem to keep coming up over and over again from meeting to meeting.
___ 22. People don't seem to care about the meeting, or want to get involved in it.
___ 23. When the group is thinking about a problem, at least two or three different solutions are suggested.
___ 24. When there is disagreement, it tends to be smoothed over or avoided.
___ 25. Some very creative solutions come out of this group.
___ 26. Many people remain silent.
___ 27. When conflicts over decisions come up, the group does not avoid them but really stays with the conflict and works it through.
___ 28. The results of the group's work are not worth the time it takes.
___ 29. People give their real feelings about what is happening during the meeting itself.
___ 30. People feel very committed to carrying out the solutions arrived at by the group.
___ 31. When the group is supposedly working on a problem, it is really working on some other "under the table" problem.
___ 32. People feel antagonistic or negative during the meeting.
___ 33. There is no followup on how decisions reached at earlier meetings worked out in practice.
___ 34. Solutions and decisions are in accord with the chairman's or leader's point of view, but not necessarily with that of the members.
___ 35. There are splits or deadlocks between factions or subgroups.
___ 36. The discussion goes on and on without any decision making reached.
___ 37. People feel satisfied or positive during the meeting.

E. Participation in Decisions

1. This item concerns the *choice of teaching methods* you use. Please mark an *X* before the *one* statement below that best describes *your* part in deciding upon the teaching methods you use.

   ( ) 1. I choose my own teaching methods without assistance or direction.
   ( ) 2. The final choice of teaching methods is left to me, but there are others whose job includes making recommendations or suggestions.
   ( ) 3. Within certain limits I can choose my own teaching methods.
   ( ) 4. As a member of a group or committee, I share with others the job of deciding the teaching methods to be used.
   ( ) 5. I do not choose my own teaching methods. They are laid down for me by others.

2. If you choose answer 2, 3, 4 or 5 in the question just above, you were indicating that some other person or persons were somehow involved in deciding upon the teaching methods to be used in your classroom. If you chose answer 2, 3, 4 or 5, please write below the names and positions of the other persons involved.

Name	Position
_____	_____
_____	_____
_____	_____
_____	_____

3. This item concerns the scope and sequence of *subject-matter content*. Please mark *X* before the *one* statement below that best describes *your* part in deciding upon the subject-matter content that you teach.

   ( ) 1. I choose the scope and sequence of subject-matter content without assistance or direction
   ( ) 2. The final choice of scope and sequence of subject-matter content is left to me, but there are others whose job includes making recommendations or suggestions.
   ( ) 3. Within certain limits I can choose the scope and sequence of subject-matter content.
   ( ) 4. As a member of a group or committee, I share with others the job of deciding the scope and sequence of subject-matter content.
   ( ) 5. I do not choose the scope and sequence of subject-matter content. They are laid down for me by others.

4. If you chose answer 2, 3, 4 or 5 in the question just above, you were indicating that some other person or persons were somehow involved in deciding upon the subject-matter content to be used in your classroom. If you chose answer 2, 3, 4 or 5, please write below the names and positions of the other persons involved.

Name	Position
_____	_____
_____	_____
_____	_____
_____	_____

5. When you want to receive approval from the faculty in your school for an idea you are proposing, it is sometimes helpful to enlist the support of certain individuals in your school. Please list below, by name and position, individuals whose support would help most in obtaining faculty approval for your ideas.

Name	Position
_____	_____
_____	_____
_____	_____
_____	_____

6. Suppose someone on the staff has an idea that he seriously thinks could help the school. What steps should he take to make sure his idea gets a hearing where it counts?

_____

_____

_____

7. Please circle the letters that indicate your best estimate of the influence of teachers and principals on the areas of school life listed at the left.

In general, how much influence...	No influence	Little influence	Some influence	Considerable influence	Great deal of influence	I have no opinion
...do you feel the principal has on how your school is run?	Ni	Li	Si	Ci	Gdi	Hno
...do you feel the teachers as a group have on how your school is run?	Ni	Li	Si	Ci	Gdi	Hno
...does the principal of your school have with teachers in your school when it comes to activities and decisions that affect the performance of their classroom activities?	Ni	Li	Si	Ci	Gdi	Hno
...do the teachers in your school have on the principal when it comes to his activities and decisions that affect the performance of your school?	Ni	Li	Si	Ci	Gdi	Hno

8. Listed below are five reasons generally given by people when they are asked why they do the things their superiors suggest or want them to do. Please read all five carefully. Then number them according to their importance to you as reasons for doing the things your *principal* suggests or wants you to do. Give rank "1" to the most important factor, "2" to the next, etc., using numerals 1 through 5 only once.

I do the things my principal suggests or wants me to do because:

___ I admire him for his personal qualities, and I want to act in a way that merits his respect and admiration

___ I respect his competence and good judgment about things with which he is more experienced than I.
___ He can give special help and benefits to those who cooperate with him.
___ He can apply pressure or penalize those who do not cooperate.
___ He has a legitimate right, considering his position, to expect that his suggestions will be carried out.

F. Openness of System or Subsystem

		Repeatedly					*Never*
1. a.	The group discusses the pros and cons of several alternative solutions to a problem.	5	4	3	2	1	0
b.	People are afraid to be openly critical or make good objections.	5	4	3	2	1	0
c.	People hesitate to give their true feelings about problems which are discussed.	5	4	3	2	1	0
d.	When the group is supposedly working on a problem, it is really working on some other "under the table" problem.	5	4	3	2	1	0
e.	People give their real feelings about what is happening during the meeting itself.	5	4	3	2	1	0

2. Suppose* Teacher X develops a particularly useful and effective method for teaching something. In Teacher X's place, would most of the teachers you know in your school describe it briefly at a faculty meeting and offer to meet with others who wanted to hear more about it?

( ) Yes, I think most would do this.
( ) Maybe about half would do this.
( ) No, most would *not*.
( ) I do not know.

*For making available the original phrasing upon which this item is based, and for the original phrasing of similar items exhibited later on, we are indebted to John Wallen, Ray Jongeward, and Michael Giammetteo of the Northwest Regional Educational Laboratory in Portland, Oregon. We have altered the form and phrasing of the original items.

3. For each of the following items, please indicate the extent of agreement with the item as it applied to you by circling the appropriate numeral

	Strongly agree	Agree	Mildly agree	Mildly disagree	Disagree	Strongly disagree
	6	5	4	3	2	1
a. It's easy to talk with my superiors about my job.**	6	5	4	3	2	1
b. I cannot speak my mind to my co-workers.	6	5	4	3	2	1
c. My co-workers welcome opinions different from their own.	6	5	4	3	2	1
d. My superiors keep me informed about what is happening in the school.	6	5	4	3	2	1

4. Suppose someone on the staff has an idea that he seriously thinks could help the school. What steps should he take to make sure his idea gets a hearing where it counts?

_____

_____

_____

_____

5. Suppose Teacher X feels hurt and "put down" by something another teachers has said to him. In Teacher X's place, would most of the teachers you know in your school be likely to...

   a. ...tell the other teacher that they felt hurt and put down?

      ( ) Yes, I think most would.
      ( ) Maybe about half would.
      ( ) No, most would *not*.
      ( ) I do not know.

**Alderfer, Clayton. "An Empirical Test of a New Theory of Human Needs." *Organizational Behavior and Human Performance*. 4:142-175; 1969.

b. ...tell their friends that the other teacher is hard to get along with?

( ) Yes, I think most would.
( ) Maybe about half would.
( ) No, most would *not*.
( ) I do not know.

6. Suppose you are in a committee meeting with Teacher X and the other members begin to describe their personal feelings about what goes on in the school. Teacher X then quickly suggests that the committee get back to the topic and keep the discussion objective and impersonal. How would you feel toward X?

( ) I would approve strongly.
( ) I would approve mildly or some.
( ) I would not care one way or the other.
( ) I would disapprove mildly or some.
( ) I would disapprove strongly.

7. Suppose you are in a committee meeting with Teacher X and the other members begin to describe their personal feelings about what goes on in the school. Teacher X listens to them and tells them his own feelings. How would you feel toward X?

( ) I would approve strongly.
( ) I would approve mildly or some.
( ) I would not care one way or the other.
( ) I would disapprove mildly or some.
( ) I would disapprove strongly.

8. Suppose Teacher X strongly disagrees with something B says at a staff meeting. In Teacher X's place, would most of the teachers you know in your school...

a. ...seek out B to discuss the disagreement?

( ) Yes, I think most would do this.
( ) Maybe about half would do this.
( ) No, most would *not*.
( ) I do not know.

b. ...keep it to themselves and say nothing about it?

( ) Yes, I think most would do this.
( ) Maybe about half would do this.
( ) No, most would *not*.
( ) I do not know.

9. Suppose Teacher X were present when two others got into a hot argument about how the school is run. Suppose Teacher X tried to help each one understand the views of the other. How would you feel about the behavior of Teacher X?

( ) I would approve strongly.
( ) I would approve mildly or some.
( ) I would not care one way or the other.
( ) I would disapprove mildly or some.
( ) I would disapprove strongly.

10. Suppose Teacher X were present when two others got into a hot argument about how the school is run. And suppose Teacher X tried to get them to quiet down and stop arguing. How would you feel about the behavior of Teacher X?

( ) I would approve strongly.
( ) I would approve mildly or some.
( ) I would not care one way or the other.
( ) I would disapprove mildly or some.
( ) I would disapprove strongly.

11. To what extent does your principal engage in the following kinds of behavior? In answering, please circle the *one* number in each row that best describes the behavior of your principal.*

	I don't know	Never	Almost never	Occasionally	Frequently	Almost always	Always
a. Brings to the attention of teachers educational literature that is of value to them in their jobs.	6	5	4	3	2	1	DK
b. Has the relevant facts before making important decisions.	6	5	4	3	2	1	DK

*Items 11a and 11b, and others of similar form exhibited below, are taken from:

Gross, N. and R. Herriott. *Staff Leadership in Public Schools.* New York: Wiley, 1965.

For a report on the use of their questionnaire in a junior high school by Program 30 of the Center for the Advanced Study of Educational Administration, see: Schmuch, R. A., and P. J. Runkel. *Organizational Training for a School Faculty.* Eugene, Oregon: Center for the Advanced Study of Educational Administration, University of Oregon, 1970, pp. 102-108.

12. How long does it normally take you to find out whether or not you are doing your job successfully? Please circle the words that come closest.**

One day	One week	One month	Six months	One year	Five years	Longer

13. The purpose of this question si to determine how administrators handle demands from community action groups. We are interested in your current methods for handling such demands and also those that have worked in the recent past. Answer column B only if you held your post at the time or know it well enough historically to make a judgment. Please circle the number below corresponding to the following scale which best represents your perceptions of how you would deal with these groups.

1. Very much agree
2. Agree
3. Uncertain
4. Disagree
5. Very much disagree

		A *At Present*					B *Before 1970*				
a.	It is important to try to protect the teacher-learner process or what goes on in the classroom from being disrupted by outside forces.	1	2	3	4	5	1	2	3	4	5
b.	The way to protect the classroom from disruption is to have outside groups deal first with either an associate or assistant superintendent.	1	2	3	4	5	1	2	3	4	5
c.	The way to protect the classroom from disruption is to have outside groups deal with the principal.	1	2	3	4	5	1	2	3	4	5

**Items 12, 13 and 20 are adapted from:

Derr, C. B. "Organizational Development and PPb for Education." Paper presented to the 1971 convention of the AERA (Mimeo). Eugene, Oregon: Center for the Advanced Study of Educational Administration, University of Oregon, 1971.

13. (Continued)

		A *At Present*					B *Before 1970*				
d.	It is highly improbable in these times that we are going to be able to protect the classroom from direct outside influences. Therefore, we just have to try to plan for outside demands and give the system some warning.	1	2	3	4	5	1	2	3	4	5
e.	One way to protect the classroom is to be on the offensive instead of the defensive with these groups: to persuade them to do otherwise instead of reacting to them.	1	2	3	4	5	1	2	3	4	5
f.	Maybe we cannot stop these people from disrupting our classroom procedures but there are surely some priorities. We should make changes in some areas before others.	1	2	3	4	5	1	2	3	4	5
g.	Developing public relations to get the support of the larger community is a good way to deal with these kinds of splinter groups.	1	2	3	4	5	1	2	3	4	5
h.	Let them change the classroom procedures if they want. We do not care.	1	2	3	4	5	1	2	3	4	5
i.	This whole change process can be a reasonable one. We should sit down with them and make those changes which are best ones for the kids.	1	2	3	4	5	1	2	3	4	5
j.	These outside groups usually care, not about the education of the children, but only their own power in the community. We should be very careful about dealing with them at all.	1	2	3	4	5	1	2	3	4	5

Items 14 through 20 were written to be used by interviewers. Some could be adapted to forms appropriate to a questionnaire.

14. Is there any important information you need that is very hard to get in this job? (yes, no)

    (If yes,) please describe: _____

    _____

    (If yes,) do you believe the information you want is available from someone in the school district? (yes, no) (If yes,) what would you have to do to get the information?

    _____

    _____

15. Have you received any information recently about your work or about the school that you found surprising? (yes, no)
    (If yes,) please describe one or two such kinds of information:

    _____

    _____

    _____

16. Do you get any information through formal channels in this school meetings, memos, etc.) that you feel is useless? (yes, no) (If yes,) please describe one or two such kinds of information:

    _____

    _____

    _____

17. How about the district offices? Do you sometimes get useless information from central office people? (yes, no) (If yes,) would you describe one or two kinds:

    _____

    _____

    _____

18. Do you get any information from other professionals that helps you to tell whether you are doing an effective job of teaching? (Do not count information from students, only from other professionals.) (Hand card to respondent.)

    (1) No, none.
    (2) Yes, once every two or three years.
    (3) Yes, about once or twice a year.
    (4) Yes, about once a month, maybe.
    (5) Yes, more than once a month but not once each week.
    (6) Yes, about once a week.
    (7) Yes, more than once a week.

19. (If yes,) from whom do you get this information?

20. In what ways has the part of your job which requires you to relate to groups outside the school system (e.g., community groups, universities, governmental agencies, parents) changed in the past five years?

PETC-III SAMPLE MEMO TO INTRODUCE
ORGANIZATIONAL DEVELOPMENT CONSULTANT

TO: (All staff)

FROM: (Installer; Supervisor authorizing participation)

_____ has volunteered for training in a program developed by the Northwest Regional Educational Laboratory. The program, which meets intermittently throughout the next eight months, is the last in a series of three designed to prepare educational training consultants (PETC-III). It focuses on organizational development (OD).

During her/his training period, _____ will be carrying out an organizational development project designed to help us strengthen our organization. She/he will be contacting you from time to time for information as work on the project proceeds. Her/his OD work will be monitored by the program trainers, _____ _____ of _____ and _____ of _____.

Because I feel our whole organization will benefit from _____'s training in OD, I urge you to give her/him your full cooperation.

SAMPLE

MAKING IT PERFECTLY CLEAR

Collecting All Data (to Bring with You to the First Meeting)

About 75 percent of the meeting will be spent in the analysis of the work you do in these preworkshop assignments. The rest of the time will be spent in using your analysis as the basis for diagnostic work and in planning.

It is crucial, therefore, that you do the work and that you bring it with you. The training depends on your having information about your organization.

SAMPLE MEMO FOR MEETING 2

TO: Participants in PETC-III Training

FROM: (Trainers)

RE: Meeting 2 of PETC-III, March 22-24, 1975

Reminder

The next meeting of PETC-III will be held at the _____. The meeting will start at 9:00 a.m., March 22. The schedule for each day will be 9:00 a.m. to 5:00 p.m.

Reading Assignment

Chapter I of *Organizational Development in Education*. The Meaning and Vulnerability of Educational Evaluation, page 9, through Current Needs and Changes of Society, page 45

Chapter II:
Characteristics of Key Functions, page 55, through The Concept of Organizational Health, page 74

Understanding Any Particular Educational Organization, page 79 through Organizational Boundaries of a School System, page 113

Chapter III:
Complex Systemic Change, page 138 through Figure 12 and its discussion

Resources

Enclosed are two reprints.*

"An Interview with Roger Harrison." by Noel Tichy. *Journal of Applied Behavioral Science.* 9(6): 701-726; 1973.

"Organizational Crisis and Change." by S. L. Fink and others. *Journal of Applied Behavioral Science.* 7: 38-41 and 390-394; 1971.

We hope you will find them useful.

*NOTE: Trainers of PETC-III should obtain multiple copies of these reprints from the sources indicated.

SAMPLE

One thing to remember about the information you are collecting is that information collecting on one thing may be useful in providing clues to something else. Remain open to the possibility of learning something about OD in addition to what you are planning for.

Keep in mind the larger framework of PETC-III as you do your work. Keep looking for clues for normative and structural change that will improve the functional capacity of your organization.

If you have a reason for calling either of us, please feel free to do so. You may call collect at _____.

Overview of Meeting 2

Day 1	Day 2	Day 3
Progress Report Study and apply Chapter III ideas to own organization Report to LG	Diagnose organization's growth and maturity Report to LG	Consider dilemmas of the ODC Guidelines for planning OD work Plan OD work Report plans to LG

SAMPLE

SAMPLE MEMO FOR MEETING 3

TO: Participants in PETC-III training

FROM: (Trainers)

RE: Meeting 3 of PETC-III

The third meeting of PETC-III will start at 9:00 a.m. on _____ at _____. The training meeting will be over at 5:00 p.m. on _____.

Reading Assignment

Before coming to the meeting please read Chapter V in the central ideas book. Also read:

Resource 18: Models and Their Functions by Gordon Lippitt

Resource 19: The Power of Abstraction--Model Building as a Way of Life by William Cozart

Meeting 3 will consist of five activities:

Activity 8: Identifying Critical Issues in the Phases of Consultation

Activity 9: Collecting Information from Self and Others About Self as Consultant

Activity 10: Giving and Receiving Feedback About Consultant Self

Activity 11: Creating Models

Activity 12: Planning Organizational Development Work (III)

SAMPLE

SAMPLE MEMO FOR MEETING 4

TO: Participants in PETC-III Training

FROM: (Trainers)

RE: Meeting 4 of PETC-III

Enclosed you will find another copy of Procedure 21: Intervention Case Papers. Please do this assignment individually. The work of Activity 13 will be based on your work on Procedure 21. Review Resource 21.

This assignment will involve you personally and separately from others in making an intervention.

This work should contribute to an increased awareness of intervention theory issues. It will also enrich the work of the training unit and the learning group for practice of reconstructing theories.

Meeting 4 will consist of three activities:

Activity 13: Evaluating Intervention Theories

Activity 14: Introducing the Process of Designing

Activity 15: Planning Organizational Development Work (IV)

We will begin Meeting 4 at 9:00 a.m. sharp on...(date and place).

If you need clarification in Procedure 21, please call collect (503) 248-6868.

SAMPLE

SAMPLE MEMO FOR MEETING 5

TO: Participants in PETC-III Training

FROM: (Trainers)

RE: Final (imagine!) Training Meeting (Meeting 5 of PETC-III)

The final meeting for the PETC-III Workshop will be:

Held at Pamela Newcomb's home, July 8, 9, 10 and 11

From 9:00 a.m. to 5:00 p.m. daily

Extended on July 10 to about 7:00 p.m. for purposes of CELEBRATION

Be sure to bring your copies of:

Organization Development in Schools

Handbook for Organization Development in Schools

The Universal Traveler

Your Activities Records for Meetings 4 and 5

Before coming to the training session:

Read Chapters I, II, III and IV in the central ideas book (sure--go ahead and read the rest!)

Complete the attached assignment, Procedure 28, "Premeeting Assignment for Summarizing PETC-III Organizational Development Work." Note carefully the cover page of the assignment, which will give you important information about the significance of the assignment. Be sure to bring copies as requested on the cover page.

If you have any questions, call (503) 248-6868. Enclosed you will find directions to Pamela's home.

SAMPLE

PETC-III

LOG OF

ORGANIZATIONAL DEVELOPMENT WORK

Dates of Project

from _____

to _____

Consultant Team _____

_____

_____

Client _____

This log is to be kept by the team and brought to each training session.

PETC-III
LOG

Date	Description of Consultant/Client Interaction	Issues of Consultant/Client Relationships
	On this form respond to the following each time some type of interaction occurs between the consultant team and the client system (including phone calls, and interactions between a single member of your team and the client system): Names of consultant team involved Persons from the client system involved Purpose of the interaction "Facilitative role" taken by the consultant, e.g., linker, modeler, trainer, etc. Action taken Results Was the interaction consistent with your intervention case theory? (If not, how might you integrate into your intervention theory?) Plans for next interaction Problems or obstacles encountered What was the reason for/ origin of problems or obstacles How problems or obstacles were handled	Following each time some type of interaction occurs between the consultant team and the client system (including phone calls, etc.) jot down your thoughts, perceptions new insights on the following items: Influence of the external or internal role in relation to the client system (e.g., if you are internal, are you finding instances of role confusion by your colleagues?) Perception of client expectations for the interaction... how were they a factor? How do you feel about the interaction? How do you feel about it in the context of your total consultant/ client relationship/experience? Other thoughts, feelings, insights

PETC-III
LOG

Date	Interaction	Issues

PETC-III
LOG

Date	Interaction	Issues

PETC-III
LOG

Date	Interaction	Issues

PETC-III
LOG

Date	Interaction	Issues

LIST OF PARTICIPANT MATERIALS

PREFACE v

CONTENTS vii

FIGURES xiii

ABBREVIATIONS xvii

FIRST MEETING 1

Activity 1: Introducing PETC-III Organizational Development 3

Resource 1: Forming Learning Groups 5

Activity 2: Part I of Analyzing Organizational Data 7

Procedure 1: Analysis of Organizational Data 9

Resource 2: Critical Issues in the Phases of Consultation 15

Resource 3: Tailoring Organizational Development Interventions for Schools 19

Procedure 2: Report of Organizational Data Analysis 47

Resource 4: Major Kinds of Problem Solving 49

Resource 5: Differential Intervention Matrix 51

Resource 6: Differential Diagnostic Matrix 53

Procedure 3: Observer Evaluation 55

Procedure 4: Application of Concepts in Chapter II to Own Organization 57

Resource 7: Growth and Maturity Possibilities for a Human System (I) 61

Resource 8: Growth and Maturity Possibilities for a Human System (II) 63

Resource 9: Summary of the Organizational Health Concept 65

Resource 10: How Things Are in Own Organization 67

Resource 11: Organizational Development/Intelligence Quotient Questions 71

Activity 3: Part II of Analyzing Organizational Data 77

Procedure 5: Application of Organizational Development Concepts to Issues of Entering an Organization 79

Procedure 6: Organizational Development/Intelligence Quotient Questions Game 83

Activity 4: Planning Organizational Development Work (I) 85

Procedure 7: Guidelines for Planning Organizational Development Work (I) 87

Resource 12: PETC-III Training Requirements and Terminology 89

Resource 13: Diagnostic Resources 93

Resource 14: Checklist for Planning Organizational Development Work 109

Procedure 8: Intervention Theory (I) 113

SECOND MEETING 115

Activity 5: Responding to Substantive Issues in Your Organization 117

Procedure 9: Report of Progress 119

Procedure 10: More PETC-III Concepts 123

Procedure 11: Guidelines for Reporting Progress 127

Activity 6: Diagnosing Organizational Growth and Maturity 129

Procedure 12: Diagnosis of Organizational Growth and Maturity 131

Activity 7: Planning Organizational Development Work (II) 135

Resource 15: Dilemmas of the PETC-III Trainee 137

Procedure 13: Guidelines for Planning Organizational Development Work (II) 139

Procedure 14: Checklist for an Organizational Development Consultant 141

Resource 16: The Phases of Consultation as Major Kinds of Work (II) 145

Procedure 15: Intervention Theory (II) 147

THIRD MEETING 149

Activity 8: Identifying Critical Issues in the Phases of Consultation 151

Procedure 16: Report of Critical Issues in the Phases of Consultation 153

Activity 9: Collecting Information From Self and Others About Self as Consultant 155

Procedure 17: Collection of Data From Self and Others 157

Activity 10: Giving and Receiving Feedback About Consultant Self 163

Resource 17: Using the Johari Window Model to Increase Awareness of Self as Consultant 165

Procedure 18: The Giving and Receiving of Feedback About Consultant Self 171

Activity 11: Creating Models 175

Procedure 19: Creation of a Model 177

Resource 18: Models and Their Functions 179

Resource 19: The Power of Abstraction--Model Building as a Way of Life 187

Resource 20: A Collection of Models 195

Resource 21: PETC-III Models 209

Activity 12: Planning Organizational Development Work (III) 231

Resource 22: The Organizational Development Consultant as Theorist (I) 233

Procedure 20: Guidelines for Planning Organizational Development Work (III) 239

Resource 23: Checklist of Some Important Concepts From PETC-III 243

Procedure 21: Intervention Case Papers 245

163

FOURTH MEETING 253

Activity 13: Evaluating Intervention Theories 255

Resource 24: The Organizational Development Consultant as Theorist (II) 257

Procedure 22: Intervention Case Study 261

Procedure 23: Intervention Case Form 265

Activity 14: Introducing the Process of Designing 267

Resource 25: The Design Process as a Problem-Solving Journey 269

Procedure 24: Design for a One-Day Event 271

Resource 26: The Universal Travel Agency 275

Procedure 25: Discussion of Designing Experience 277

Activity 15: Planning Organizational Development Work (IV) 279

Procedure 26: Guidelines for Planning Organizational Development Work (IV) 281

Procedure 27: Intervention Theory (III) 283

Resource 27: List of PETC-III Resource Papers 285

Procedure 28: Premeeting Assignment for Summarizing PETC-III Organizational Development Work 287

FIFTH MEETING 295

Activity 16: Reviewing Organizational Development Work 297

Procedure 29: Final Report of Organizational Development Work 299

Activity 17: Evaluating Intervention Strategies and Techniques 307

Procedure 30: Evaluation of Intervention Strategies and Techniques 309

Activity 18: Constructing Own Differential Intervention Matrix 315

Procedure 31: Construction of a Differential Intervention Matrix 317

Resource 28: Intervention Chart 319

Activity 19: Building a Future for Your Consultant Self 323

Procedure 32: Your Future as a Consultant 325

Resource 29: Building a Future for Your Consultant Self 329

Resource 30: PETC-II Descriptions 331

Resource 31: Table of Contents for *Organizational Development in Education* 351

Resource

APPENDIX A: First Time Out: Case Studies of Neophyte Consultants 355

BIBLIOGRAPHY 427

Figures in Participant Materials

FIRST MEETING

FIGURE 1. Major Criteria for Three Kinds of Problem Solving 49

FIGURE 2. Differential Intervention Matrix (I) 51

FIGURE 3. Differential Diagnostic Matrix (I) 53

FIGURE 4. Growth and Maturity Possibilities for a Human System: Description of Growth Stages (I) 61

FIGURE 5. Growth and Maturity Possibilities for a Human System: Description of Maturity Phases (I) 63

FIGURE 6. Summary of the Organizational Health Concept 65

FIGURE 7. Definition of Needs 94

FIGURE 8. The Phases of Consultation as Major Kinds of Work (I) 112

SECOND MEETING

FIGURE 9. Potential Conflicts and Dilemmas 137

FIGURE 10. The Phases of Consultation as Major Kinds of Work (II) 145

THIRD MEETING

FIGURE 11. The Johari Window 165

FIGURE 12. Degrees of Openness 166

FIGURE 13. Interaction Between Two Persons 167

FIGURE 14. The Relative Size of Quadrant 4 168

FIGURE 15. Diagnosing Change Needs of a Client 196

FIGURE 16. Harrison's Model for Organizational Diagnosis: Categories and Subcategories 197

FIGURE 17. Design Process 198

FIGURE 18. Four Ways to Be a Change Agent 199

FIGURE 19.	Research Utilizing Problem Solving Model	200
FIGURE 20.	Planning, Fact Finding and Execution	201
FIGURE 21.	Major Elements to Be Considered in a Systematic Diagnosis	202
FIGURE 22.	The Social Interaction Perspective	203
FIGURE 23.	A Linkage View of Resource-User Problem Solving	204
FIGURE 24.	Resource Acquisition Is a Three-Part Problem	205
FIGURE 25.	A Stepping-Stone Strategy for Gaining Group Acceptance	206
FIGURE 26.	The Problem Solver's Strategic Orientation	207
FIGURE 27.	Planned Renegotiation: A Norm-Setting OD Intervention	208
FIGURE 28.	Relationships of the Three PETC Systems	210
FIGURE 29.	Possible Evolution of Social-Psychological Self	211
FIGURE 30.	Lag Time Between Dimensions of Evolution	212
FIGURE 31.	Growth and Maturity Possibilities for A Human System: Description of Growth Stages (II)	213
FIGURE 32.	Growth and Maturity Possibilities for a Human System: Description of Maturity Phases (II)	214
FIGURE 33.	Functional Capabilities for Continuous Growth in Educational Organizations	215
FIGURE 34.	Summary of the Concept of Organizational Health	222
FIGURE 35.	Major Factors in a School's Movement Toward a Mature Educational Purpose	223
FIGURE 36.	Organizational Maturity and Variables to Consider in Facilitating Interventions	224
FIGURE 37.	Two Kinds of Structural Linkage in an Organization	225
FIGURE 38.	Phases of the Consultation Relationship for Planned Change	226
FIGURE 39.	The Phases of Consultation as Major Kinds of Work (III)	227
FIGURE 40.	Differential Diagnostic Matrix (II)	228

FIGURE 41. Differential Intervention Matrix (II) 229

FIGURE 42. Espoused Human Interaction Theory of Consultant Team 234

FIGURE 43. Reconstructed Human Interaction Theory of Consultant Team 236

FIFTH MEETING

FIGURE 44. Relevance of Strategies and Tactics for Stages of Change 321

FIGURE 45. Building a Future for Your Consultant Self 329

FIGURE 46. Differential Diagnostic Matrix for Locating and Diagnosing Problems in Human Systems 332